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AUTHOR Wallin, Theodore A.; Kidder, Alice
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ABSTRACT

This manual focuses on the start-up and operation of low-cost transportation in rural areas. A principal focus is the use of volunteers and/or the consolidation of rides through a brokerage program. Chapter One provides an overview of what financial and operating decisions must be made to design a volunteer system. Chapter Two describes easy methods for determining need for service and discusses needs assessment and demand estimation relative to the issues of passenger willingness to pay. Chapter Three addresses the service levels to be offered by a program and offers suggestions on formulas for estimating cash and other resource costs of service level choice. Chapter Four considers choices about organization and reviews the costs of starting a low-cost system based upon surveys completed by Syracuse University (New York). Chapter Five outlines budgeting for day-to-day operations. Chapter Six examines the sources of volunteers and financial support to sustain low-cost systems. Chapter Seven reviews the five most frequently asked questions about financing and sustaining volunteer systems. An appendix profiles 20 case study programs in 12 states, describing service areas, numbers of vehicles and volunteers, budgets, type of service, and sources of cash. An annotated bibliography cites 58 references. (NEC)

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Financing and Sustaining Mobility Programs in Rural Areas

A Manual

August 1986

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Final Report
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Prepared by
Theodore A. Wallin and Alice Kidder
The Franklin Program in Transportation
and Distribution Management
Syracuse University
Syracuse, New York 13244-2130

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Urban Mass Transportation Administration
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INTRODUCTION

This manual focuses on the start-up and operation of low-cost transportation in rural areas. A principal focus is the use of volunteers, and/or the consolidation of rides through a brokerage program. Other types of low-cost programs include van pooling or car pooling, travel clubs, and shared ride taxi services. Since the latter programs have been discussed extensively elsewhere (see Bibliography), this manual will primarily treat the use of volunteers and brokerage as a technique for cost-containment.

What is a brokerage system? The brokerage concept assumes that one or more organizations come together to set up a communication link between customers (those persons in rural area who require general purpose public transportation) and the suppliers of low-cost transportation (volunteers, human service agency transportation which also has a general public component, or locally-subsidized ride consolidation programs such as Dial-a-Rides which aim at trip economy, or competition-driven, for-profit private sector provider programs, with or without userside subsidies.

No two rural areas are alike. Local residents will be in the best position to know whether a volunteer program can be set up successfully. This manual is merely a guide to help answer the technical issues on cost and finance which are bound to arise. It is not a rule book. Local conditions may call for a different direction. The challenge is ahead: you can provide sorely needed, life-saving and life-sustaining mobility for transportation dependent people who lie beyond the reach of public transportation. The key is economy. Do it simply. Do it without a lot of public expense. Do it without a lot of red tape.

The rewards are obvious. You will have contributed a much needed solution to a serious problem. You will be playing a key role in your community. You will have the satisfaction of seeing a well run system in operation. You will share the relief of those who will now have a relatively inexpensive way to get to recreation, medical appointments, shopping, religious exercises, or other activities. You will be keeping down taxes. You will be helping your local economy.

The Design of This Manual

Chapter One provides an overview of what financial and operating decisions must be made in designing a volunteer system. Read this for general understanding. You will have a lot of technical questions. The answers come in later chapters, with suggested sources for answering the questions.

Chapter Two describes easy methods for determining need for service. It points up lessons learned by volunteer systems which have been in place for several years. Needs assessment and demand estimation is discussed relative to the issue of passenger willingness to pay.

The third chapter discusses the service levels to be offered by your program. Clearly you will not meet all the needs discussed in Chapter Two. You must prioritize. You must set limits to service. Too stringent rules may lose customers, however. The choice is yours, and should be reviewed with key decision-makers, such as funding sources, political leadership, and volun-

teers. Since service levels to some extent determine costs, care should be taken at this point to forecast the costing implications of service level choice. Costing of alternative service levels is key to cost-containment strategies. This chapter offers some suggestions on formulas for estimating cash and other resource costs of service level choice.

The fourth chapter discusses the choices about organization. Who will manage the program? How will the volunteers be recruited? Will you screen the volunteers? Financial aspects of this question include (1) salaried or volunteer sources of management (2) the real cost of management time and the value of "in kind" donations of managerial service and (3) replacement cost issues. This chapter reviews the costs of starting a "low-cost system," based upon surveys completed by Syracuse University. What are the costs of getting a program up and running? What are the sources of vehicles to use in the program, and what are the financial implications of different sources of vehicles? What other costs may one expect at the beginning of a low-cost rural mobility program?

The fifth chapter discusses budgeting for day-to-day operations. What are the costs of operations? What is the role played by volunteers and brokerage in controlling the costs of operations? Are there hidden costs of the operation, such as training volunteers, replacing volunteers, or the overhead associated with trying to serve as broker among contributing organizations?

The sixth chapter examines the sources of volunteers and financial support to sustain low-cost systems. Can reliable sources of volunteers be found, and if so, how can you sustain the supply over time? What organizations can support the overhead necessary to keep "low-cost" systems in operation year after year? What is the role of state and local financing? What is the role of the private sector?

Chapter Seven reviews the Five Most Frequently Asked Questions about financing and sustaining volunteer systems: (1) Are volunteers reliable? (2) Can I afford the extra insurance needed to handle liability of a volunteer program? (3) Can I get continuing financial and technical help from the state or federal government programs which support rural transportation? (4) Do I need a special license to run a volunteer program? (5) How do I get started, and what information will I need to get started?

CHAPTER ONE

WHAT IS A VOLUNTEER TRANSPORTATION PROGRAM?

Volunteer-based transportation programs meet an important need. For those communities where the numbers of travelers are so small that economical commercial service is not available, volunteers can contribute their time to making sure key trips are made.

Questions about volunteer-based systems are always the same. The answers are not. This chapter will discuss those questions. The later chapters will discuss ways you can get good answers to the questions for your local area. Think big. Don't get bogged down in details. Answers will be forthcoming from surprising sources.

THE QUESTIONS

There are ten questions which every system must answer.

Question One: Does my rural area need service?

Question Two: Who needs service the most?

Question Three: Which needs will our program answer? Which needs will we leave to others to answer?

Question Four: What rules will set the limits on the service we offer, and allow us to control costs?

Question Five: What organization will run the program? Who will be in charge? Who will be allowed to make changes in the answers to Questions 1-4? How much will it cost to set up the management? How much will it cost to get vehicles?

Question Six: How much will the program cost each year?

Question Seven: Where do I get resources? Where will the volunteers come from? How will they be screened and selected? Where will I get funds to cover the cash costs of the volunteer program?

Question Eight: How do I manage operations? Do the volunteers need special licensing and/or training?

Question Nine: How reliable is a low-cost program? Does it produce service? Does it survive over time? How can I make my service most productive and cost-effective?

Question Ten: How does our program relate to the rest of the community? Do we have to comply with any regulations? Will we be taxed? What are the insurance requirements? Can we avoid legal suits?

Question One: Does my rural area need service?

A good volunteer based program knows its market. It knows who really needs service. It does not waste time setting up services which are

duplicated by the private auto trips of its residents.

Trips which meet several individuals' needs at once are economical. Do you know when several people from one part of the country need rides to the same meeting? Will they be able to come back together? Is there a central point for receiving trip requests, or are several agencies performing this duplicative service for several client subgroups (e.g. mental health patients, Headstart children, senior citizens, meals-on-wheels, programs for the visually impaired, and emergency, hotline calls for transportation?)

Are there people for whom transportation is very difficult? Are there people who must get to work, but who can't drive themselves because of vision impairment, lack of mechanical coordination, or other physical disability? What about the travel needs of the mentally retarded, the mentally ill, and the sub-driving age population? What about the trips which the frail/very elderly must make if/when they are beyond the safe driving age?

Do all persons regardless of income level have their own personal transportation either through their own car/truck, or with friends? What about the second potential wage-earner in a family which has only one working vehicle? What about college or technical students who need to get to their classes, but who have no car of their own? What about welfare mothers who have been trained, and now need transportation to get to a job?

One of the first decisions which the volunteer program must make is how can one identify the needs in one's own community. Chapter Two of the manual makes some suggestions. It also discusses how you can get professional help from planners at county, regional, and state levels, or from the human service agencies in your area.

Question Two: Who needs service the most?

When you have answered Question One, most of you will find that the problem is prioritizing, choosing the most important needs to serve first. This is a very tough question. Each human service agency thinks the trips of its own group are the most important. The agencies serving the elderly will put the aging network first. Those whose job it is to offer service to the mentally retarded will put them first. The Headstart program director will question why service is only offered to an adult clientele. And so on.

The most important challenge to achieving low-cost, brokered transportation service is getting a community-wide consensus on priorities. Otherwise, the agency-by-agency "go it alone" philosophy will result in high cost, poorly advertised service grudgingly doled out to a select, and favored few within each agency program.

Question Three: Which needs will our program answer?
Which needs will we leave to others to answer?

In Chapter Three of the manual you will be asked to choose the level of service you will provide. Your choice of service levels tells the world what your priorities (Question 2) really are. If you only offer service within your town or county, you are saying that the travel needs of cancer patients who must get to radiation treatments thirty miles away are less important than shopping trips. If you offer your service only to clients over the age of 55,

you are saying that the travel needs of low income persons of working age are less important than the recreational trip of the elderly. If you require that calls for service be made three days in advance, you are deciding that the emergencies which crop up on the spur of the moment are less important than the predictable travel patterns of those who can think ahead.

Naturally, you cannot provide for all needs. It is important that the volunteer system keep track of other programs which are meeting other needs, so appropriate referrals can be made. Is there an inventory of local programs available through your regional transit authority, or through the regional planning office? These and other questions are discussed in Chapter Three.

Chapter Two looks at low-cost or no-cost ways of getting the information on needs, and how much persons are willing to pay for mobility services in rural areas.

Question Four: What rules will define the service we offer?

Each volunteer system must choose its own level of service. What hours can calls requesting service be made? When will service be available -- days only, what about weekends? What about evenings? What about holidays?

Will you pick people up at the door? Will you enter a house to carry in heavy grocery bags? Will you require transfers?

What geographic areas are served for pickups? What destinations will be served? Where will dropoff points be? Where will transfer points be?

Will this be an on-call system, or will it only offer service along certain fixed routes or zones?

What are the boundaries of the service area? Will you go beyond the boundaries if it is an emergency?

What call-ahead requirements will you impose? How can people call in for service? During what hours?

Will only registered persons be allowed to use the service? If so, what are the criteria for registration? Age? Disability? Will the general public be allowed to use the service?

What will be the difference in cost if different service levels are chosen? Is there a limit to the number of volunteers you can get? Is there a way to place a limit on trip length, trip cost, and trip frequency for the individual rider?

What formulas are available to calculate the cost of providing a trip out of town? What about the cost of providing service along a particular rural route?

These cost-related topics will be discussed in Chapter Three.

Question Five: What organization will run the program? Who will be in charge? Who will be allowed to make changes in the answers to Questions 1-4? Who will pay for management? Who will pay for communications?

Who will pay for vehicles? Even simple, pure volunteer systems need a focal point. Who can be called to get service? Who answers questions, and assigns priorities?

The issue of management is crucial. There are many models from which to choose. Many systems work with part-time, volunteer managers. They hardly recognize the title. They merely are "on call" to take messages, transmit requests for service. Others use part of the time of paid staff of an agency to coordinate the program.

Which agency will donate staff? Will their time have to be compensated? To whom will this manager report?

Will a full-time, paid manager be able to run the program? Who will provide funds for this job? It's a large one!

Issues in organization and management are discussed in Chapter Four. Each rural area is different, so suggestions made in Chapter Four should be ignored if you have an ingenious way of getting along without a central management. One idea might be to call in requests to a central switchboard (the town police? the town clerk? an emergency hotline?), and let people who wish to volunteer call every once in a while to get an idea of who has called in. Persons needing rides would know they had one if/when a volunteer let them know they were willing to take them. Chapter Four discusses the costs of organization and start-up of low-cost mobility programs.

What about the cost of getting the equipment to get started? There are lost of vehicles out there. You may be surprised at how many sources of vehicles are discussed in the second part of Chapter Four.

Vehicles have to be looked after. Both servicing, and preventive maintenance are important. There are inexpensive ways of getting help here. They are also discussed in Chapter Four.

Look ahead. How will you get more vehicles when the ones you are using wear out? Are you building financial reserves, and a good community reputation so that you can have a successful capital campaign for new vehicles in a few years?

If you rely on volunteers' vehicles, will these volunteers recruit newcomers when the time comes for the volunteers you have now to retire? What impact does the program have on the maintenance of volunteers' vehicles?

Question Six: How much will the program cost each year?

Inevitably some cash outlays are needed in most "low-cost" systems. How can these costs be estimated ahead of time? What activities are important (training, recruiting, communications, publicity, and evaluation.) Chapter Five reviews the costs experienced by a variety of systems.

Question Seven: Where will the volunteers come from? How will they be screened and selected? Where will I get funds to cover the cash costs?

Finding, screening, and retaining volunteers is the heart of the program. Chapter Four discusses these issues.

Many people seem to think it is becoming increasingly difficult to find volunteers. They suppose that because more housewives are working now, and because more people are trying to hold down two jobs, it is very difficult to find volunteers.

The experience of large-scale, volunteer-based systems does not suggest that this is a big problem. New sources of volunteers are coming into play. More attention is being paid to volunteers. More people are finding that volunteering is an exciting way to be useful. "Get them to volunteer once," said one agency director, "and you never have any problem with getting them to come back. They see the value of what they have accomplished."

To date, most volunteer based systems have had superb driving records. Few accidents, good relations between staff and riders, and a high spirit of cooperation are consistently reported by those who have made the program work. Chapter Four also discusses the procedures agencies use to screen volunteers, so that the record continues to be superb.

Finding the financial resources to sustain the program is more difficult, since the governmental support sources are primarily oriented to large, fixed route, city-based public transportation. However, many communities have found exciting ways to support the cash costs of low-cost systems. These will be reviewed in Chapter Six.

Question Eight: How do you manage operations? Do the volunteers need special licensing and/or training?

Many volunteer-based systems have no licensing or training at all. Making it simple is important. However, day-to-day operations sometimes require more than a simple orientation of new volunteers. Some must be trained in communications, in CPR, in dispatching, in routing and scheduling, and in defensive driving techniques when operating a large van or bus.

Another aspect of training involves developing sensitivity to the needs of the immobile. How do you operate the lift? How do you move a person in a wheelchair, or do you let them move themselves? How do you communicate with a blind person? How do you make the transportation service a friendly, pleasant experience? Chapter Six discusses both local and national sources of training services.

Question Nine: How reliable is a low-cost program? Does it produce service? Does it survive over time? How can I make my service most productive and cost-effective?

Chapter Seven discusses the errors often made by low-cost/low output rural transportation programs. Some systems have only a few customers per year. But, you answer, some service is better than no service, isn't it? Perhaps not. Persons in rural areas will continue to rely on very informal

contacts with friends and relatives to get around, unless the alternatives are dependable, understandable and cost-effective. Clearly the use of neighbors, friends, and family members is the best form of a low-cost system. But that system is not usable by the "general public," as access closed to outsiders. So to compete with informal car pooling, a visible, publicly accessible program must be seen as continuing to exist and provide service.

Question Ten: How does our program relate to the rest of the community? Do we have to comply with any regulations? Will we be taxed?

Volunteer-based programs offer a freedom from many regulations related to compensation, taxation, and franchises. However, states differ in the amount of regulation over volunteer-based systems. Some insurance coverage is desirable, and that usually involves state regulation over rates, coverages, and risk pool determination. Some states want drivers offering public transportation services to get a special driver's license. How to get information on these regulations is covered in Chapters Six and Eight.

The interaction between the voluntary transportation program and the rest of the community is important. Reputation will govern whether the system will be permitted to expand, and draw on other local resources. The high regard of local elected officials is essential. Where systems are viewed skeptically, problems occur. Participating human service agencies must be taught to recognize and respect program priorities. If volunteers have a positive experience, they will help recruit other volunteers.

Chapter Eight reviews some of the tough questions which are frequently asked about volunteer-based programs. The experience of existing programs comes into play in this chapter. Words of advice from practitioners may be helpful to those just beginning a system. However, other sources of information abound. There is a wealth of information sources; the problem will be finding time to read and sort through the best materials. For this reason, an annotated bibliography is provided at the end of the manual. Readers are invited to share their reactions to these materials with the authors, and make suggestions about additional material they have found useful.

CHAPTER TWO

INEXPENSIVE WAYS TO DETERMINE THE LEVEL OF NEED FOR RURAL MOBILITY SERVICES

SIMPLE APPROACH:

Need for service must be determined in the planning process that precedes setting up a program. As a rule of thumb, about ten to fifteen percent of a rural area's population has some form of transit dependency. They cannot travel at will because they have no personal transportation solution (auto, truck, taxi service, etc.) Therefore, in the absence of any better information, you can take the service area which lies beyond the reach of conventional public transportation, find the population for that area, and multiply by ten percent (.1).

Then compare the numbers from that estimate with a list of individuals who can be identified as transit dependent. This list might include the following likely groups:

1. frail elderly (those persons no longer able to drive themselves)
2. children in families with no available transportation
3. students who do not have cars of their own, and who need to get to colleges, technical institutes, job training programs, etc.
4. the physically disabled (persons with vision impairment, multiple sclerosis, polio, paralysis, and so on) who have not been able to drive by themselves
5. the mentally disabled (mental retardation, mental illness, brain injury, etc.)
6. the low-income family which does not have one car for each wage-earner, and for whom at least one adult is transit dependent (for example, welfare mothers without cars)
7. those who are fearful of driving, or who are unwilling to drive to unfamiliar areas such as hospitals in large cities
8. those who have no license to drive
9. those who have no transportation to programs designed for special groups, for example, the seniors (e.g. recreation sites, adult day care), for the low income (e.g. welfare offices), or for the general public (e.g. public hearings)
10. spouses of wage-earners who take the family's only vehicle to work, leaving the spouse with no transportation for part of the day.

You can make this list work for you if you add information from other sources, including your own surveys, census data, and needs assessments.

SURVEY APPROACH:

The "simple approach" has its pitfalls. Just because a person falls in a transit dependent "group" does not necessarily mean that the person is interested in having public transportation options. Many prefer to wait until a family member or friend can give them a ride.

A better way to determine who "needs" service, is through a survey of the entire population of those who lie beyond the reach of conventional public transportation. They can be reached through the cooperation of public utilities (telephone companies, electric companies, gas companies) who send bills to most families in the area each month. Public utilities can be approached to donate space in the monthly mailings for a survey of interest in transit and paratransit programs. They will frequently donate the costs of analyzing the results.

Other groups who can donate survey work include local colleges (try the marketing or sociology departments), research departments of city banks, and major employers who have national or regional headquarters in the survey area.

The results of the survey have to be taken as very tentative. It is easy for persons to say they would use transit if it were offered. When the actual service levels are decided (hours of pickup, phone-ahead requirements, trip times, and other features of the system), the potential customers may have lost interest.

USING CENSUS DATA:

Using data from the twenty percent sample of the 1980 Census, you can find estimates of the "transit dependent" for selected areas.[1] Several warnings are in order. First, these data come from self-identification questions. Advocacy groups for the transit dependent point out that many persons, even severely disabled individuals, do not identify themselves as transit dependent. They prefer to do without services rather than be counted in this way. Second, the data are several years old now, having been collected in 1979. Third, the boundaries of census areas may or may not correspond to the area of the rural area in question. Finally, the data pertain to respondents living in the area. They do not discuss trip needs of persons who need to travel into the area, for example to get vocational training or therapy.

GETTING DONATED PROFESSIONAL ASSESSMENTS OF TRANSPORTATION NEED:

Most rural areas fall within the jurisdiction of an organization which does transportation planning. These organizations may be:

* regional public transit authorities
* regional planning departments
* regional councils of governments
* MPO's (metropolitan planning organizations)

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[1] Any municipal public library carries this information.

* county planning offices
* planning arms of the Area Agencies on Aging
* PIC's (private industry councils)
* state departments of transportation, in states which assign jurisdiction for the "balance of state" (non-urban) to the state government
* state-level human service agency planners (dealing with elders, the disabled, or other groups with interest in paratransit)

These organizations may be persuaded to conduct a more professional needs assessment for a designated area. They can apply transportation planning techniques such as those discussed in the bibliography to estimate the local need for service.

You will be competing with the service requests from more densely populated areas. Therefore, it is not always possible to get these services donated.

As one option, universities with urban and regional planning departments may be willing to perform planning services for a rural area, in exchange for internship opportunities for students, development of interesting teaching materials, or for the good will created.

FINDING OUT HOW MUCH PEOPLE ARE WILLING TO PAY FOR MOBILITY

Need is one thing; "demand" (the willingness to pay) for service is another. It is important to realize that the rural transit dependent frequently pays a considerable amount already for transportation. Riders should be expected to pay a reasonable portion of the costs of service.

How can you determine what the transit dependent already pays for service? Find out about taxi programs in the area. Do taxies offer service to and from your area, even though they may operate out of another city? What do they charge if they are "deadheading" back from a drop-off in the area?

Are there informal cash transactions among friends who offer rides? Is it expected that a low income person who gets a ride to the doctor's office, will pay $3, $5 or $10 to the driver? Does an elderly aunt usually fill the gas tank for a nephew who takes her grocery shopping once a week?

Finding out what people are now paying for service is revealing. You may be surprised how much the cash cost of transportation is currently for the transit dependent in your area.

The next question is, "What are people willing to pay?" There is no easy answer to that question. It depends on the package of service you are willing to offer. In general, people will pay more for service if:

* service is door-to-door
* there is no "free" service in neighboring communities or from other organizations
* service is friendly and courteous
* service (and equipment) is dependable

* the equipment is comfortable and suitable (e.g. lifts for wheelchair travelers)
* it offers privacy
* it minimizes travel time, including transfers
* it goes direct from origin to destination
* they understand the link between payment and continuation of service
* it brings them an economic advantage (gets them to a job, a welfare check, to a cheaper shopping area)
* they have the assets or income to afford it

It has been the experience of many systems that charging at least two dollars per round trip for short trips, and up to fifteen dollars per round trip for trips in excess of twenty-five miles is possible. Zone fares are important in low-density areas where added distance adds to cost (more driver time, more gas, more wear and tear on the vehicle.)

Discussions with persons likely to use a transportation service, through an advisory group or through organizations such as seniors programs, may clarify expectations about how much people have paid (and would pay) for varying levels of service.

If the program planned is intended to be largely volunteer, riders may question why there is a need for cash. Be prepared to show budgets which include organizational overhead costs, costs for reimbursement of volunteers, and other genuine cash costs.

Need, demand, and actual utilization are slippery concepts. One concept does not imply another. Even if you meet some needs you may be missing others. As time goes on, one gains a good understanding of the actual utilization of one particular choice of service level (the one actually offered), but the potential usefulness of, and demand for, another service approach is largely hypothetical until tried.

Another approach to "needs assessment" is to look at the needs of organizations or activities that riders travel to, which are the reasons why people need mobility. Surveys of medical facilities (doctors' office complexes, hospitals, clinics), of shopping center managements, of senior citizen recreation programs, of civic activities, of religious and entertainment organizations, will show up a "need" to get customers, clients, guests, and attendees, from rural residences to places of social activity. How much would these destination organizations "pay" for the transportation of the people they wish to cater to? Close attention to this question will lead in the direction of additional funding sources to be discussed below in Chapter Six.

CHAPTER THREE

CHOOSING AND COSTING ALTERNATIVE SERVICE LEVELS

Not all the needs. as we saw in Chapter Two, can be met by a rural transportation program. Hard choices as to priorities must be made. These choices must be made with reference to the prospective cost of providing different levels of service.

Consider these factors which affect the cost in a low-cost program:

Hours of service: Many volunteers wish to drive only within stated hours. Providing additional service in the evening may require a contract with a local taxi cab company to augment the service by volunteers.

Pickup area served: The wider the pickup area, the more expense to pick up clients. Volunteers are typically reimbursed at a rate of $.20 per mile (1985 data), so an additional five miles will add a dollar of cost to an agency budget. If the volunteers contribute their own gas, an additional five miles adds $.40 to $.60, depending on the fuel efficiency of the car.

Destination areas served: The addition of another destination to an existing schedule adds two costs: the cost of additional mileage, but also the cost of the time of passengers who must wait past one drop-off for a later destination. Time costs to passengers is often a crucial factor in whether a service is used. Normally, it is not wise to expect a transit dependent person to ride in a van for more than twice the time it would take to get to the destination directly in a private car. Also, it is unwise to have anyone's trip last more than 45 minutes, unless it is an occasional long trip out of town.

Procedures for escorting the riders: Persons with physical handicaps may require assistance, to get in and out of their homes, help with groceries or other hand items, and help getting in and out at the destination. Volunteer escorts are a cost-effective way to accomplish this. They ride on the van free of charge, and take responsibility for the rider. Sources of volunteer escorts may be family members, friends, neighbors, or volunteers in general.

Hours for taking trip requests: Paid staff (or volunteer time) to answer the phone calls is another important resource. Many volunteer systems require 24 or 48 hour advance notification during a limited number of hours (typically 9 AM to 12 noon.) These rules are frequently ignored in practice to take care of emergencies, but they are still a good way to ration scarce resources.

Choice of appropriate equipment: Lift-equipped vans may be required to offer adequate service to the transit dependent in a rural area. The local cost of such equipment, and its maintenance is a factor in the overall budget. More discussion of equipment is in Chapter Four.

Numbers of pickup points: If service is pickup at the door, the early boarders will have a number of intermediate stops before getting to the destination. Requiring a common pickup site (such as a town hall) may keep some transit dependent from using the service. However, additional pickups add to the time cost of the service (approximately 5-10 minutes per pickup), and add slightly to the fuel costs involved.

Unfortunately, those factors which make a service (door-to-door pickup, special equipment, direct service to destination without transfers) are those factors which make rural transportation very expensive (frequently $10 - $20 per client trip.

Some activities have a low cost per client trip, such as a charter bus trip for senior citizens. However, the need may be greater for other activities, since the seniors may have been perfectly willing to car pool at an even cheaper cost.

Since the major share of the cost of providing rural transportation is labor cost, using volunteers is an excellent way of saving money. In a survey of twenty volunteer-based transportation programs, recently conducted by Syracuse University, the average value of volunteer time contributed in 1984 was $69,750, and ranged upwards as high as $371,570 for OATS (Missouri)! Even very small volunteer programs gain $2,000 to $3,000 dollars of value from the time contributed by volunteers. Many programs would have their cash budgets balloon by 50 to 90% if they had to pay minimum wages for the volunteer hours contributed. The average number of volunteer hours contributed during the month of the survey was 499, showing that indeed volunteer services can be the financial backbone of an effective rural transportation service.

Table 1 lists approximate costs of providing different types of service, based upon a 1984 survey. It may be used as a guide to estimating the cost of service using volunteers.

Other approaches (shared ride taxi or agency-based transportation program) may be more expensive since the driver must be paid (usually at a rate of $4 - $8 per hour, and more in some areas.) Many rural systems are run with paid staffs, because it is difficult to get volunteers to cover all technical aspects of the program. Discussion of the costs of mixed staff/volunteer systems (the normal pattern) may be found later in Chapter Five.

TABLE 1

ILLUSTRATIVE UNIT COSTS OF SEVERAL TYPES OF SERVICE

Type of Service	Cost per unit
Pure volunteer, gas donated local trips	$ 2.00 per trip (borne by volunteer)
Pure volunteer, reimbursement local trips	$ 4.00 per trip (borne by agency)
Door-to-door pickup, one hour trip to clinic or cancer treatment center and return	$10.00 per trip (borne by volunteer) $20.00 per trip (borne by agency)
Telephone communications	$60/month
Fixed route van service	$ .40 per mile (gas and oil only)

Note: these are the cash costs of direct service; no allowance is made for overhead.

In choosing the dimensions of service for your low-cost program, it is wise to be aware of other transportation services available in your area. An inventory of service providers would include:

* commercial taxi service
* commercial charter bus service
* commercial charter van or camper service
* intercity, bus common carrier service
* automobile rental agency transportation
* human service agency transportation programs (senior citizens vans, transportation for Medicare and Medicaid patients, Headstart transportation, vocational rehabilitation transportation and others)
* brokerage systems in nearby communities
* community action agency transportation programs
* employer van pool programs
* emergency hot lines
* ambulance, both volunteer and commercial
* school bus
* postal route transportation
* transportation clubs

For a discussion of these particular forms, see the Bibliographic references in the Appendix.

Avoiding duplication of service, by coordination with other service providers is a source of cost-containment. Filling in "gaps" in other services through a volunteer or brokerage program is a cost-effective way to meet the transportation needs of many different groups.

SETTING SERVICE LEVELS

Choices constrained by available resources will be required. A typical pure volunteer program frequently makes one or more of the following choices:

. limits service to those who can use a car
. limits service to daytime hours for trips
. limits service to priority groups (elderly, for example) thereby, by definition, failing to offer general mobility
. limits service to the immediate town (thereby failing to meet critical needs for medical and welfare services)
. limits service to 24 hour advance reservation (thereby preventing its use by travelers moving across the state)

Great care should be taken in setting priorities. It is easy to meet the needs of the very mobile, middle income elderly retiree; it is difficult to provide mobility to other groups which may need the service more, because they have no alternatives.

FORMULAS FOR ESTIMATING CASH AND OTHER RESOURCE COSTS OF SERVICE LEVEL CHOICES

Per person cost of trip

X = A times B plus C times A minus D times A

that is,

$(X = A \cdot B + C \cdot A - D \cdot A)$

where X is the per trip cost for a given person and where:

A is the cash cost per mile (from Table 1)

B is the number of miles between origin and destination

C is the number of miles driven empty to pick up client

D is the number of miles in which this person shares a ride with another passenger

Volunteer time cost

V = [A + B + C - D + E] times W

where:

V is equal to the cost of the volunteer's time to complete one trip

A is the time spent in driving from origin (home) to pick up client

B is the time to load and transport client to destination

C is the time to wait for the client

D is the time to load and provide return transportation

E is the time to return to origin or next activity

and W is the hourly wage which the person could have earned realistically if they were not performing the volunteer service. The simplest number to use here would be the Federal minimum wage, though in the case of managers a figure of $6.00 to $10.00 per hour is more realistic.

Per trip labor cost of overhead to provide for brokerage service

Sum of all the hours of paid staff time, times the appropriate hourly rates, including fringes of the paid staff, divided by the annual numbers of trips produced .

Total overhead cost for a volunteer, or brokered system

Add the following cash costs of any items not donated:

Rental
- Office
- Maintenance facility
- Parking facility

Communications
- Telephone
- Depreciation on owned communication equipment
- Postage

Other Utilities
- Heat
- Water

Staff wages and salaries for persons on annual salaries

Office equipment
- Rental
- Supplies
- Depreciation on owned equipment

Publications and publicity

Insurance

Fees, taxes, and licenses

Vehicle maintenance and repair

Choice of service levels therefore is highly dependent upon the availability of donated services (volunteer time, maintenance service, and overhead.) The service preferences of the volunteers will play an important role in shaping the limits of service offered. Additional service may have to be provided with mixed staff/volunteer programs.

Table 2 offers examples of annual costs experienced by several transportation programs interviewed in the Syracuse study. The wide diversity of experience suggests that many different approaches can be successful, as long as the local commitment to providing service continues. For example, one pure volunteer system offered more than 16,000 passenger miles of service for as low as $.28 per mile. Another mixed paid/volunteer system provided about 60,000 miles at a dollar cost of more than $1.20 per mile. In the latter case, paid drivers were used, and volunteers merely supplemented the service of the driver staff.

Choice of service levels must reflect realistic assessment both of priorities in need for service and of realistic assessment of donated and financial resources available to the project. The answers are as individual as the communities which plan low-cost systems. The bibliography contains references to many case studies of rural transportation, which may be consulted as a guide to expected cost.

The choices made at the beginning of a project can be altered. However, the project's reputation gained at the start may be lasting. Therefore care

should be taken in the choices of structure, management, vehicle sources, and service levels.

What are some of the mistakes commonly made?

(1) Management does not know how to relate service demand offered.

Significant mismatches occur. For example, it is decided to offer service to Town A on Mondays, but the elders want their appointments on Thursday.

Or vehicles are chosen which do not provide comfort and safety to wheelchair-bound riders.

Or a fee schedule is imposed which makes travel prohibitive to a target group, such as welfare mothers.

(2) Trip destinations provided by geographic boundaries of the political jurisdiction (a town, a township, a county, for example) are not the desired trip destinations of the rural residents, who schedule their activities across political boundaries.

(3) Arbitrary cutoff of service hours prevents use by persons who must return from activities after the service has closed for the day.

This chapter can only be a guide. It cannot prescribe the appropriate answer to the difficult task of choosing levels of service, constrained by cost factors. Finding out what others are doing, through associations such as Rural America, or through the transit associations of one's state, will help you compare your own experience with that of others.

TABLE 2. - CASE EXAMPLES OF ONE YEAR CASH FLOW, WITH SOURCES

Case I. Low Volume, pure volunteer systems

Bolton Council on Aging
PO Box 342
Bolton, MA 01740

Total number of passenger trips	15
Average trip length	12
Total annual mileage	180

Dollar expenditure

By volunteers

Telephone (uses home phone)	0
Gasoline & oil	$17.50
Insurance (no surcharge for volunteering)	0

By agency

Publicity (uses newsletter which goes out regardless of program)	

TOTAL ANNUAL OUTLAY	$17.50

(agency occasionally, but rarely, gets asked for reimbursement)

Table continued on next page.....

TABLE 2. - CASE EXAMPLES OF ONE YEAR CASH FLOW, WITH SOURCES (continued)

Madison County Senior Citizens Transportation
PO Box 250
Morrisville, NY 13408

Total Number of passenger trips:	64
Total Annual Mileage:	2,963
Average trip length:	46 miles

Dollar expenditure

By volunteers - no figures

By agency

Telephone	$1,100
Drivers	5,936
Secretary	120
Record Keeping	120
Dispatcher	4,180.9
Mailing	100

TOTAL ANNUAL OUTLAY	$11,556.9

Case II. Low Volume, mixed volunteer/paid

Voluntary Action Transportation System
2125 East South Blvd.
Montgomery, Alabama 36116

Number of passenger trips	76
Number of vehicle miles	917
Average trip length	12 miles

Dollar expenditure

By volunteers

None

By agency

Space	$128
Telephone	306
Records	50
Managers	1837
Postage	20
Insurance	119

Table continued on next page.....

TABLE 2. - CASE EXAMPLES OF ONE YEAR CASH FLOW, WITH SOURCES (continued)

Faith Countryside Homes
1331 26th St.
Highland, Ill. 62249

Passengers boarded	281
Passenger miles	470
Vehicles miles	482

Dollar expenditures

By volunteers

20¢/mile

By agency

No figures, part of overall housing complex budget. Not itemized.

TOTAL ANNUAL OUTLAY: $30,240 for the bus. Used HUD money which had to be replaced.

MedVac
Voluntary Action Center
680 Haish Blvd.
Suite 300
DeKalb, Ill. 60115

Passengers Boarded	20
Passenger Trips	110
Vehicle Miles	3172

Dollar expenditure

By volunteers

No record

By agency

No record

MedVAC's Statistics are combined with those of TransVAC which is a larger, nonvoluntary part of the VAC operation as a whole.

Table continued on next page.....

TABLE 2. - CASE EXAMPLES OF ONE YEAR CASH FLOW, WITH SOURCES (continued)

Case III. Middle volume mixed systems

Address of the example you gave: SEN-CEN
Seneca County office for the Aging
PO Box 480
Seneca Falls, NY 13148

Consolidated Transportation Services Agency
Volunteer Center of Napa County, Inc.
1700 Second St. #308
Napa, Ca. 94559

Passenger trips	3640
Vehicle miles	16,582

Dollar expenditures

By volunteers

20¢/mile

By agency

TOTAL ANNUAL OUTLAY	349,164

Washington-Hancock Community Agency, Transportation
PO Box 280
Milbridge, NH 04658

Passenger trips	2635
Passenger miles	75,991
Vehicle miles	41384

Dollar expenditures

By agency

Gas & oil	$8,800
Space	2,833
Phone	12,118
Drivers	27,244.69
Managers	45,592
Maintenance & repair	7,494
Record keeping	3,380.84
Staff travel	239.70
Insurance	6,740
Admin. services	3,865
Tickets & vol. drivers mileage	92,441
TOTAL ANNUAL OUTLAY	$210,748.23

TABLE 2. - CASE EXAMPLES OF ONE YEAR CASH FLOW, WITH SOURCES (continued)

County Older Resident Program
555 S. Brentwood
Clayton, MD 63105

Passenger trips	1332
Vehicle miles	14,448

Dollar expenditures

By agency	$18,908
Not itemized	
TOTAL ANNUAL OUTLAY	$18,908

Community Action Transportation Program
36 Autumn St.
Rochester, NH 03867

Passenger trips	1,004
Passenger miles	2,084
Vehicle miles	2,246
TOTAL DOLLAR OUTLAY	$45,000

Not itemized

Gadabout
710 Court St.
Ithaca, NY 14850

TOTAL DOLLAR OUTLAY	$101,369 in 1984
Maintenance & repair	15,200
Record keeping	3,000
Insurance/license	7,000
Replacement appropriations	13,300
Volunteer services	1,000
TOTAL DOLLAR OUTLAY	$105,700

Table continued on next page.....

TABLE 2. - CASE EXAMPLES OF ONE YEAR CASH FLOW, WITH SOURCES (continued)

American Red Cross Special Transportation Service
4701 E. Washington St.
Phoenix, Ariz. 85034

Passenger trips	12,955
Vehicle miles	62,141

Dollar expenditures

By agency

Gas & oil	$88,909
Tires	32,188
Space	17,667
Phone	10,093
Managers	26,004
Secretary	12,000
Maintenance & repair	43,573
Record keeping	12,286
Spare parts	13,318
Salaries	115,623
Training	3,067
Accountant (Audit)	2,275
Office supplies	10,993
Insurance	15,401
Staff mileage	1,549
Misc. Admin.	3,034
TOTAL ANNUAL OUTLAY	$407,930

Eastern Transportation Services, Inc.
153 Illinois Avenue
Bangor, ME 04401

Passenger trips	3,086
Passenger miles	89,901
Vehicle miles	37,262

Dollar expenditures

By agency

Gas & oil	$37,678
Space	6,898
Phone	6,581
Drivers	78,185.35
Managers	40,000
Secretary	7,000
Vehicles	17,190
Maintenance & repair	30,890
TOTAL ANNUAL OUTLAY	$224,422.35

TABLE 2. - CASE EXAMPLES OF ONE YEAR CASH FLOW, WITH SOURCES (continued)

Rock County Rides
51 S. Main Street
Janesville, Wis. 53545

Passenger trips	2,428
Dollar expenditures	
By agency	
Gas & oil	$11,072
Tires	600
Space	900
Phone	1,200
Drivers	36,000
Managers	22,000
Secretary	5,500
Vehicles	19,962
Maintenance & repair	4,127
TOTAL ANNUAL OUTLAY	$101,361

CHAPTER FOUR

THE DESIGN AND START-UP OF A RURAL TRANSPORTATION LOW-COST SYSTEM

Persons seeking to organize a low budget, rural mobility program are immediately faced with several major questions. Who will manage the program? Where will the vehicles come from? How will volunteers be recruited and screened? This chapter reviews the financial implications of these choices, drawing on the experience of the twenty cases studied in the Syracuse University survey.

One appreciates immediately the diversity of pattern. No two programs make their financial choices in the same way. Many types of programs appear to be succeeding, from the very small, to the gigantic. Readers may wish to scan the many case studies of rural transportation offered in the bibliography to pick up useful suggestions on strategic choice and design of systems.

The Choice of Management

A critical choice must be made early. Who will manage the program? Will the management be in the hands of a volunteer, or will the program seek funding to pay a professional manager? An intermediate solution is to borrow the staff time of a currently hired employee, who was originally assigned to a human service agency, to a private corporation, or to a local government.

Most of the systems which have made large scale contributions to rural mobility have a paid management. Of the twenty systems interviewed in the Syracuse Project, fourteen were directed by paid staff. Several of the others were small in scale, and provided only very partial contributions to general mobility in their rural communities.

Management time commitments and salaries range widely. It appears quite possible to manage a project offering in the vicinity of up to 30,000 miles of service annually with a part-time manager, provided there is a dispatcher and volunteer drivers. See Exhibit I. When reaching to higher levels of service (such as 50,000 miles of service or beyond), the numbers of volunteers and vehicles to be coordinated climbs beyond the capacity of most part-time managers. A full-time manager with the requisite skills may be hard to find. Exhibit II gives a sample job description for such a manager. Because most human service agency administrators do not have the requisite background, the technical knowledge must be developed through formal training of in-service personnel (see Appendix A for a list of key contact persons), or someone with transportation experience must be hired. Some transportation programs have been fortunate enough to acquire retired taxi company operators, bus company operators, or other members of the transportation industry. Others have promoted dispatchers or other clerical staff into positions of coordinators. Results here have been mixed.

EXHIBIT I

Reported Patterns of Part-time versus full-time Management
by Monthly Vehicle Miles Produced

Monthly Vehicle Miles of Service	Part-time Management (less than 35 hours per week)	Full-time Management (35 hours or more per week)
	482	16,600
	3,172	14,448
	10,922	
	30,000	

Monthly Vehicle Miles of Service		
	no examples	80,000
		110,600
		276,140 (multiple managers)

EXHIBIT II

SAMPLE JOB DESCRIPTION FOR DIRECTOR OF VOLUNTEER-BASED TRANSPORTATION PROGRAM

The Director shall arrange for the recruitment, training, and deployment of volunteers [optional and paid staff] to operate a personal mobility program. The Director shall arrange for the purchase or lease of vehicles, the maintenance of vehicles, and the writing of grant proposals or solicitations to replace vehicles as necessary.

The Director shall recruit and train the persons necessary to accomplish the following tasks: intake and certification of eligibles [if applicable], trip request processing, routing and scheduling, dispatching, information management, invoicing, and report-generation.

The Director shall work with transportation planners to develop a program consistent with local goals and funding opportunities. The Director shall negotiate with service providers, where appropriate for contracted service with private sector operators. Where applicable, the Director shall negotiate service contracts with other human service agencies or other groups/individuals with needs for transportation. Such contracts would reimburse the organization for services rendered. Third party payment invoicing will be developed.

The Director will design and manage a program to train volunteers and other staff in key areas such as (1) sensitivity training (2) emergency or CPR training (3) defensive driving for volunteers (4) regulatory matters [if applicable].

The Director shall attend such interagency meetings, planning workshops, or other means of coordinating the volunteer transportation programs with the other organizations needing service. The Director shall handle program marketing, and make service information available to transportation brokers, agencies, and other interested parties.

Skills: Business related skills in finance, accounting, and marketing; interpersonal skills in negotiation and contract writing; transportation management experience and/or educational background.

Attitude: Friendly, likes to work with advocacy groups, service providers, and clients.

Assuming one insists on a technically-trained manager, one should anticipate spending the equivalent of $20,000 - $30,000 for a full-time manager. Students graduating with B.A.'s and M.B.A.'s from transportation programs are expecting salaries of this amount. Perhaps one can find a trainable human service agency director or staffer, and adjust the salary accordingly, but market values are likely to prevail.

Many systems get along with part-time managers, frequently managers trained in human service specialties, not transportation management, are employed on the project. Exhibit III presents statistics from the Syracuse study showing the pattern of usage of managers, along with associated salaries, for those volunteer-based systems which reported paid managers.

EXHIBIT III

EMPLOYMENT PATTERNS AND SALARIES OF MANAGERS
OF REPORTING VOLUNTEER-BASED TRANSPORTATION SYSTEMS

Mean number of hours per month of paid management time	28.6
Average annual paid salary	12,567.2
Mean number of volunteer manager hours per month	12.9

What are the sources of part-time managers, particularly those provided from the staffs of agencies? The Syracuse study identified the following as sources of organizational leadership:

* Councils on Aging
* Red Cross
* Easter Seals
* Emergency hotlines (like the Good Samaritans)
* Mental health programs
* Medical staff of hospitals
* Community Action Agencies
* Churches or other religious organization
* Retired Senior Volunteer Program (RSVP)
* United Fund or equivalent combined philanthropy

Alternatively, if the program decides to stop providing or brokering service directly, it can develop into a shared-ride taxi service, where the program management is left up to the private operator to provide designated service at an agree rate. Management issues then are the responsibility of the private provider, who handles insurance, vehicle maintenance, driver selection and training, and billing. Or another private provider (persons who lease or dispatch, at fee, vans equipped for the handicapped) may serve this function. Finally, charter bus service, particularly at off-peak hours, may be arranged through a regional carrier, either public or private.

Table 3 shows the patterns of use of paid and volunteer work. Typically systems use paid managers, or a combination of paid and volunteer for setting up the organization, writing grant applications, planning, conducting needs assessment, hiring and training staff, arranging insurance and publicity, and finding substitutes when drivers are no-show. Volunteers are likely to be used for driving and dispatching.

Table 4 shows the distribution of elapsed time required to accomplish various tasks relating to start-up. Since some of these tasks can be worked on at the same time, Figure 1 gives a sketch of the overall pattern. It takes approximately three years to develop a transportation program. Initial organizational meetings, usually involving two or more agencies, take up an average of five months for everyone to begin to understand the proposed idea, and the role each agency may play. Planning and coordination continue throughout the three years. Specific proposal writing, and negotiation of financial support must begin during the first year, and frequently take at least a year (maybe two or three) to be successful.

Once funds are raised, there is still a lot of organization work. Hiring staff, recruiting and training volunteers, deciding on the scope of service and operations, marketing and experimenting with service options are just a few of the initial hurdles. Many meetings are necessary to secure permits, and arrange for housing of vehicles, maintenance of vehicles, licences, interagency financing agreements, and other necessary start-up activities.

Most agencies evolved their transportation program over a protracted time period. In the early stages, volunteers may have planned or conceptualized the general scope of the project. In about half of the cases, however, it was paid staffs who set the wheels in motion. Here are some of the steps through

which these agencies typically passed:

Design of plan: One or two key leaders hit upon the idea of creating a transportation program to serve, if not the general public, at least more than one agency's clientele.

Seeking support: These leaders reach out to other agencies or decision-makers, to explore the possibility of getting needed resources, contracts, reimbursements, or other sources of funding. This step takes a lot of time, typically five months or more.

Seeking approvals: With a plan in mind, a lot of contracts are needed with persons or groups who must confer their approvals or authorities:

. Space: Who will house the project: At what cost?

. Dispatching: Who will serve as volunteer to take telephone trip requests? Will they permit the use of their home telephone?

. Planning: Who will register those needing transportation? Who, if anyone, will do a needs assessment?

. Insurance: Who will pay for a policy covering volunteers? Who will issue the policy?

. Bookkeeping and business functions: Who will do the paperwork, and pay any bills?

. Contract negotiation: Who will negotiate contracts for service? Under what terms? Frequently, agencies will pay a transportation provider a flat cents per mile rate. Thus, a volunteer system can get funding to reimburse volunteers for mileage, as long as the mileage is recorded and billed.

THIS PLANNING PROCESS REQUIRES NUMEROUS MEETINGS, WRITING OF DRAFT AGREEMENTS, DISCUSSIONS WITH AGENCY HEADS. The systems interviewed in this study reported an average planning period time of 17 months (low was 2; high was more than 100).

Recruiting Volunteers: Someone must develop and maintain an accurate roster of potential drivers, or other volunteers. Those offering to drive must be quizzed about their time and duty preferences, and a check made that proper personal insurance is carried by the individual volunteer. The agency's policy is merely a supplement; volunteers' cars must be checked for suitable coverage. Also, many of the agencies interviewed ran the names of volunteers through the computer

files of the state police, to screen out any bad risks.

Marketing of services: Some attempt must be made to match potential riders with service providers. Clients, or agencies wanting transportation for their clients, must learn of the service, its cost, its restrictions, and its enrollment procedures. Only a few of the agencies advertise, per se; word of mouth is considered the proper way of transmitting information about the service in the case of low-budget volunteer systems. The result of this low-cost approach is frequently lack of awareness on the part of the general public that such a "public" transportation system exists. The service tends to give repeat business, over and over, to a relatively small number of different individuals. "Hiding the system" by not advertising is the easy way out in rationing limited service opportunities; it does not provide a useful, general public transportation function for newcomers to the town, for disabled who do not wish transportation merely for agency purposes, but also for ordinary, personal mobility needs.

Training of volunteers: Interestingly, most systems did not engage in much, if any, formal training. Once screened, volunteers are given directions to the pickup point, and some coaching on the nature and preferences of the person to be transported.

Arranging for vehicles, parking, maintenance, etc. Most volunteer systems rely in part on agency vehicles, to increase the scope of operations. Considerable time may be spent in looking for a safe place to house the vehicle. (Especially in rural areas, where distances are great, it would seem to make sense to let one of the drivers keep the car over night).

Table 5 shows the time it took to accomplish various tasks so that organizations could get into operation. The results are surprising evidence of the long start-up period needed to generate an organization capable of using volunteers on a large scale. Just to get to the stage where organizations have decided that they want to start a transportation program may take as many as 1,000 hours of staff time (the mean time reported was 157 hours). Getting the needed funds by writing proposals may take another 85 hours of staff time, but the wait may be as much as two years (latter figure not shown on table). Other time-consuming tasks in the start-up phase include recruitment of volunteers (average of 91 hours); training volunteers (average of 38 hours), and designing the routes and schedules (57 hours).

Thus, one sees that an important cost of getting started may keep many programs from developing. Overcoming this hurdle is the biggest job facing a rural area. Let's look at an example of what level of cost might be involved. See Table 6.

TABLE 3. - PAID VERSUS VOLUNTEER SOURCES OF STAFF BY TASK

	Numbers of agencies			
	Paid only	Volunteers from agency	Open Volunteer	Paid and Volunteer
Setting up organization	10	2	3	5
Applying for vehicles or grants (although some do not seek any funds, use volunteer cars)	18	0	1	1
Planning	11	1	1	5
Surveys of need	13	1	1	5
Hiring staff	17	0	0	3
Finding substitutes for no-show volunteers	12	1	1	6
Publicity	15	0	1	4
Insurance	18	0	0	2
Maintenance of vehicles	16	1	0	3
Dispatching	10	0	2	8
Driving	6	5	1	8
General Management	14	1	1	4

Sample Size: 20

TABLE 4. - ELAPSED TIME REQUIREMENTS TO PASS SELECTED MILESTONES

Task	Mean months required to pass milestone	Lowest number of months reported	Highest number of months reported
A. Calling initial organizing meeting	5.3	1	15
B. Getting agreement to start a transportation service	5.2	1	15
C. Meeting with other organizations to consolidate or coordinate service	24.6	2	99 or more
D. Writing proposal for funding (only during the initial period before vehicles started on the road)	5.8	1	12
E. Getting needed funds to get started	5.9	1	15
F. Meeting with key officials to get approvals (leases, donations of space, permits, etc.)	5.4	0	50
G. Planning the service and program	17.1	2	99 or more
H. Hiring staff	16.4	1	99 or more
I. Recruiting volunteers	33.7	2	99 or more
J. Training volunteers	5.0	0	9
K. Training other paid drivers	1.7	0	2
L. Publicity	4.9	2	12
M. Arranging insurance	3.8	0	14
N. Setting up routes and schedules	19.0	1	99 or more

Table continued on next page

TABLE 4. - ELAPSED TIME REQUIREMENTS TO PASS SELECTED MILESTONES (continued)

Task	Mean months required to pass milestone	Lowest number of months reported	Highest number of months reported
O. Making experimental changes in routes and schedules	34.7	2	99 or more
P. Other tasks involved in start-up	3.7	1	8

TABLE 5. - HOURS SPENT IN INITIATING THE PROGRAM TO THE POINT WHERE SERVICE STARTS

	Total number of hours spent (mean)	Lowest response	Highest response
A. Calling initial organizational meetings	85	3	510
B. Getting agreement to start a transportation service	157	6	1,000
C. Meeting with other organizations to consolidate or coordinate service	45	0	100
D. Writing proposals for funding (only during the initial period before vehicles started on the road)	30	0	100
E. Getting needed funds to get started	85	0	500
F. Meeting with key officials to get approvals (leases, donations of space, permits, etc.)	20	0	50
G. Planning and service and program	76	4	200
H. Hiring staff	19	0	30
I. Recruiting volunteers	91	30	200
J. Training volunteers	38	0	99
K. Training other paid drivers	33	0	80
L. Publicity	20	1	100
M. Arranging insurance	25	0	100
N. Setting up routes and schedules	57	0	100
O. Making experimental changes in routes and schedules	22	0	80
P. Other tasks involved in start-up	20	0	80

TABLE 6. - ILLUSTRATIVE COSTS OF START-UP

Task	Hours	Possible Cost Per Hour	Total Cost
Organizational meetings	85	$7.50	$ 637.50
Negotiation of agreement and coordination	140	7.50	1,050.00
Proposal writing	30	7.50	225.00
Service planning and organizational arrangements	96	7.50	720.00
Hiring staff and recruiting volunteers	110	7.50	825.00
Publicity	20	7.50	150.00
Hypothetical Total		.....	$3,607.50

Note: This figure matches closely with the average cost of start-up estimated by the systems studied by Syracuse to be approximately $3,976.

Even using user-side subsidies involving the private sector will not eliminate start-up costs, when agencies have to pool budgets to cover expenses through contract-for-service arrangements. Many of the same tasks must be performed: identification of service needs, development of funding proposals, negotiation among the agencies. These start-up costs could be avoided if a local government were to underwrite the program; however, the difficult decision of how to allocate service priorities comes into play if the agency budgets are not used.

Solving the problem of Start-up Costs

Some states provide start-up incentives in the form of subsidies to initiate service. Here the examples of Michigan, Wisconsin, and Minnesota figure prominently in the discussion. Wisconsin offers an incentive to developing coordinated programs. Michigan offers in some cases demonstration grant support.

Some states require that all human service agency funding be channeled, if possible, through a regional transportation provider. In the case of North Carolina, for example, the state requires that all requests for transportation expense (purchase or lease of vehicles, reimbursement for client trips, or payment to drivers) be referred a regional screening group. This group asks why the general public transportation service provider in that area cannot provide the service at a cheaper price. Only with special justification, is an agency granted transportation funds which do not coordinate with the rural public transit provider. That service provider enjoys a subsidy through the Federal Section 18 program, and thus is equipped to handle many of the up front costs of service initiation.

Other states depend upon the good will of volunteer groups or cooperating agencies to come together for coordinating programs. Massachusetts, for example, encourages rural areas to join a regional transit authority. If the rural area does not choose to do so, however, there are no funds to cover start-up. Therefore, areas continue to be without service.

To check your state policies, here is a list of contacts which should be pursued within the State Government and elsewhere to discover what funds, if any, are available to cover start-up costs:

Person in charge of Section 18 Program

Person in charge of Section 16(b)(2) Program

Persons involved in any interagency work on transportation for human service agencies

Persons in the public transit division administering programs of state assistance

Persons interested in initiating employer car pool or van pool programs

Persons interested in county or regional transit support at the local government or regional transit authority level

To some extent the problem resolves itself if volunteers handle the initial tasks. Table 7 indicates that the average number of volunteer hours is lower in the management area, than for other categories. This problem is not easily resolved, since the skills needed for initiation and implementation are valuable, and less frequently donated.

Sources of Vehicles

The easiest way low cost systems have found to provide cars is to use the vehicles which belong to the agencies. This pattern works well in a small, mainly volunteer program. Volunteers generally do not expect the agency to reimburse them for the cost of insurance or repairs. Frequently (in somewhat more than half the cases) the volunteers are reimbursed at a rate of $.20 per mile. This rate does not cover the full cost per mile of vehicle operation, but would cover immediate out-of-pocket expenses for gas and oil.

The problem with using this approach is that most volunteer-owned vehicles are not equipped for lifts, and thus may be insufficient capacity to handle all transportation needs of the transit dependent. An inventory of vehicles currently in use may be helpful. A review of the agencies providing human services or interested in personal mobility in the area includes, but is not limited to:

* Medicaid
* Medicare
* Elder services
* Nutrition sites
* Senior citizens centers
* Mental health programs
* Mental retardation programs
* Employment and training programs
  (either through community colleges,
  technical institutes, or Private Industry Councils
* Welfare programs
* Churches and other religious organizations
* Civic groups (Lions, Rotary, or Kiwanis, for example)
* Advocacy groups formed by the elderly and handicapped
  persons of the area
* Local units of government
* Regional transit authorities with
  paratransit programs
* Hospital outreach
* Meals-on-wheels
* Private, non-profit agencies

Some local transportation planner may already have completed an inventory of service providers, located vehicles, and identified needs. Build on this work, if possible. If no such inventory exists, approach local colleges and universities to discover student interns (in sociology, business, or social work programs, particularly) who may be willing to undertake such a survey for free.

TABLE 7. - USE OF VOLUNTEERS VERSUS PAID STAFF, BY TASK
(Data reported for month prior to interview)

Task	Number of Volunteer Hours	Number of Paid Worker Hours
Management	Mean = 3	Mean = 16
	(Range) = 0 - 24	(Range) = 0 - 99
Driving	Mean = 50	Mean = 28
	(Range) = 0 - 99	(Range) = 0 - 99
Dispatching	Mean = 12	Mean = 20
	(Range) = 0 - 99	(Range) = 0 - 99
Clerical	Mean = 12	Mean = 22
	(Range) = 0 - 80	(Range) = 0 - 99
Escort	Mean = 11	Mean = 0.1
	(Range) = 0 - 51	(Range) = 0 - 1
Other	Mean = 12	Mean = 14
	(Range) = 0 - 99	(Range) = 0 - 99
TOTAL	Mean = 176	Mean = 89
	(Range) = 0 - 971	(Range) = 0 - 999

Another way to identify vehicles is to consult the agencies responsible for subsidizing the purchase of vehicles within the state. Here the Section 16(b)(2) coordinator in the State Department of Transportation is helpful. There may also be a state capital assistance program which supports the purchase of paratransit vehicles.

Even if vehicles are present in the service area, they may have no slack time to be folded into a bigger program. The issue of what vehicles could be worked into a general mobility program is a tricky one. Some were purchased with the requirement that priority use be given to selected groups (elderly, for example). Depending upon local support for flexible policies, these vehicles have been incorporated in broader, general public transportation in rural areas in some states. That is because the "special client" and the "general public" may be one and the same in rural areas.

Cost of Vehicles

Buying rehabilitated vans which are lift-equipped may be the most cost-effective way of getting capacity. Michigan, for example, makes these reconditioned vehicles available to a limited number of human service agencies.

Buying new vans can be expensive. New vehicles may cost as much as $30,000 to $40,000. Technical advice is frequently available from the transit division of the state department of transportation. A number of references on vehicle selection are available in the Bibliography.

Other costs

Cash costs at the beginning of a program may include:

* Insurance (coverage for volunteers typically runs $400 - $800 for a supplemental liability policy)

* Licenses and fees

* Bonding

* Communications installation costs

* Deposits

Summary

Start-up costs in the neighborhood of $4,000 to $5,000 may confront those wishing to initiate a new service. These costs include the imputed value of the initiator's time, the cost of getting insurance to cover volunteers, and incidental costs. They do not include the cost of getting space or vehicles.

In addition, considerable capital cost may be involved in securing the proper vehicles for the service. If subsidies or inexpensive reconditioned vehicles are not available, then low-cost programs may wish to develop all-volunteer programs, where the driver supplies the vehicle, or to develop a user-side subsidy program where private sector providers (taxicabs, vans for handicapped, or charter buses) supply the service to designated users.

CHAPTER FIVE

COST OF SUSTAINING OPERATIONS IN A VOLUNTEER-BASED TRANSPORTATION PROGRAM

In the pure volunteer system, the cost of operations are all absorbed by the volunteers. Telephone bills are paid by the participants. The volunteers handle their own car repair bills. No particular record-keeping is involved. Advertising for volunteers is frequently by word of mouth. Any publicity for the program is handled by local mailings, or by announcement through meetings and local newsletters.

In point of fact, most systems interviewed in the Syracuse study of volunteerism did not operate this way. Most of the systems (and all of the large systems) experienced cash costs. Table 8 presents an exhibit of the annual costs of several of these systems. Costs vary widely, depending upon the extent and level of service provided. The average cash outlay for on-going operations was $69,000 per annum. These costs included a full-time manager ($20,00), gas and oil ($5,000 and above, at a rate of $.15 to .40 per vehicle mile), insurance ($400 - $800), drivers' wages ($4.00 - $7.00 per hour), clerical costs ($3,000 and above), vehicle maintenance (costs variable), and other expenses such as communications, computers and so forth.

The use of volunteers assisted in reducing the needed outlays. The average system saved about half of its budget through the use of volunteers, but still had to find nearly $70,000 in cash to operate. The use of volunteers may have saved some agencies only ten per cent of its budget; in other cases it saved nearly all. Creativity is the key. A summary of the volunteer programs interviewed is found in Appendix A.

The best approach to estimating the annual cost is to develop a budget. Guides to this process are listed in the Bibliography. Using the experience of systems in Tables 4 and 7 as a guide, construct your best guess as to the annual expenses after the system has been in operation for a while. Don't confuse the start-up costs which will be experienced after the system gets under way.

Estimating How Much Time will be Required by Staff or Volunteers

Table 7 has already set out the results from the Syracuse study of the number of hours each month to perform different staff functions. You can see where volunteers are used, and where paid staff predominated. Overall, the average agency used 176 hours of volunteer work per month, and 89 hours of paid staff work.

The range of responses in Table 7 provides evidence that different agencies work the staffing in very different ways. Much is decided by the availability of volunteers with the right skills, by the willingness of cash resources to fill whatever is missing.

Comparison between Volunteer-based Systems and Non-volunteer-based systems

Table 8 offers comparisons between parts of systems of similar size, but where one employs considerable numbers of volunteers. It can be seen from

this how important volunteers are in restraining costs. The Table shows that for similarly situated systems, with somewhat comparable regional economies and size of operation, the volunteer systems tend to operate on a smaller cost per vehicle mile basis. However, the differences are not spectacular, owing in part to the overhead cost of organizing and maintaining volunteer systems.

Brokerage systems

One low-cost technique for adding a mobility program is to set up an office, with a "broker", a person well versed in local conditions, who can take calls from agencies (or individuals) needing services on a recurring basis, and match them with existing service providers. These providers can be from the for-profit, private sector (taxicabs, rental companies, private bus operators, special transit operators, ambulance services, for example) as described in the Bibliography. They may also be from the non-profit organizations.

The broker can help in drafting contracts for service, in arranging to consolidate trips, and information dissemination. The broker can keep track of current costs, charges, and consumer reaction to service provided.

The cost of a broker operation is the time of the paid staff person ($15,000 - $20,000 per year). It is also the cost of rental space, office supplies, transportation allowance, and telephone or other communications. The total cost of such brokerage may be estimated at $20,000 to $25,000 per annum using a full-time person.

Hidden Costs

The volunteer-based system carries with it some lesser known costs. Good programs offer the volunteer the opportunity for personal growth, through sensitivity training, training in CPR, defensive driving, or lift operation. Sometimes advocacy groups can be hired to give sensitivity training.[1] Sometimes hospitals or other professional organizations will donate this training.

Time spent in replacing volunteers is an on-going cost to the operation. Marketing the program, recruiting with organizations and individuals, and registration are time-consuming. Each new volunteer must be screened: license verified, insurance coverage checked, driving history reviewed with officials, and interviews.

Time for orientation of volunteers is necessary. Introduction materials may become obsolete and must be updated. The volunteer organization should anticipate these expenses as part of the ongoing activities.

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[1] See Bibliography.

TABLE 8

COMPARISONS OF VOLUNTEER AND NONVOLUNTEER PROGRAM COSTS
ON VEHICLE MILE BASIS

Pair I	Vehicle Mileage	Total Cost	Cost per mile
Non Volunteer Program			
Hot Springs Intracity	120,900	$300,092(1981)	$2.48
Volunteer Program			
Seattle Volunteer Transportation Escort Service	148,213	$ 77,542(1984)	$ .52

Pair II	Vehicle Mileage	Total Cost	Cost per mile
Non Volunteer Program			
CART	44,799	$ 53,833(1980)	$1.20
Volunteer Program			
Gadabout Transportation Services, Thompkins Co., NY	81,441	$101,369(1984)	$1.24

Pair III	Vehicle Mileage	Total Cost	Cost per mile
Non Volunteer Program			
Highest cost of the Coordinated Transportation Demonstration Projects	24,000	$ 24,000	$1.00
Volunteer Program			
Faith Countryside Homes (only small volunteer component)	6,000	$ 30,240(1984)	$4.50

TABLE 8
(continued)

COMPARISONS OF VOLUNTEER AND NONVOLUNTEER PROGRAM COSTS
ON VEHICLE MILE BASIS

Pair IV	Vehicle Mileage	Total Cost	Cost per mile
Non Volunteer Program			
North Country Transit	168,876	$162,025	$ .79
Volunteer Program			
Volunteer Center of Napa County (only partially volunteer-staffed)	175,111	$289,000	$1.65
Transportation Projects for Cayuga County	110,610	$ 94,000(1984)	$ .85

Pair V	Vehicle Mileage	Total Cost	Cost per mile
Non Volunteer Program			
MBTA The Ride	-	-	more than $3.00
Volunteer Program			
Voluntary Action Montgomery County Alabama (largely volunteer)	10,000	$ 5,000(1984)	$ .50

Pair VI	Vehicle Mileage	Total Cost	Cost per mile
Non Volunteer Program			
Fort Peck	52,904	$121,777	$2.30

From these examples, you can see that volunteer systems tend to be less costly, even though there are some counter-examples, particularly for systems which are only partially volunteer. It is overhead cos f development and maintenance that drives up the cost of volunteer transportation.

CHAPTER SIX

SOURCES OF VOLUNTEERS AND FINANCIAL SUPPORT

Finding Volunteers

The programs using volunteers offered a variety of useful suggestions about sources of volunteers:

* Go to the office which gives senior citizens cards and advertise the need for volunteers through that office.

* Approach organizations designed to recruit volunteers:
  Voluntary Action Centers
  Retired Senior Volunteer Program
  Green Thumb
  Red Cross
  Churches and other religious organizations
  Civic Groups (Rotary, Kiwanis, Lions).

* Work through the networks of "younger" elders (social clubs, support groups).

* Identify other groups which have been successful in getting volunteers (FISH, soup kitchens, nursing homes, hospitals, and share information).

* Seek advice from the general "how to" manuals listed in the Bibliography.

Screening and Selecting Volunteers

Most volunteers will bow out gracefully if the work is not to their liking. However, to keep insurance costs down, a few precautions are generally practiced by the agencies using volunteers:

* Check and verify the insurance coverage of volunteers' cars.

* Check driving records with state authorities.

* Quiz volunteers about preferred hours and locations for driving and respect their imposed restrictions.

Training Volunteers

Cost-effective operations require intensive training of volunteers. Volunteers should plan to devote 15-20 hours of time to getting training in a variety of areas:

* physical handling of the frail and elderly

* operation of wheelchairs, lifts, or other types of equipment

* sensitivity training, to gain confidence in coping with stressful situations, in learning to appreciate the strengths and weaknesses of the physically impaired, and understanding their own human reactions to problems likely to confront the volunteer

* elements of physical care (in cases of distress, upset, vomiting, seizures, and other cases o f illness) including CPR, anti-choking techniques and the like

* safe vehicle operation (remember vans do not always drive like cars)

* good personnel practices, role of attitude, and other aspects of the personal support role played by volunteers

* rules and regulations of the agency and its funding sources

A number of elderly/handicapped support groups offer such training on a fee basis. Other sources of training include: the American Red Cross, Heart Association, or local hospitals for CPR training; interest groups such as the Epilepsy League, the kidney associations and foundations, or other groups such as the Cancer Society with special program interest; and individual nurses or physicians who may offer such training on a voluntary basis.

Driver training may be available through neighboring transit authorities, or human service agency programs. It is good to check with the 16(b)(2) coordinator at the state department of transportation. This person may be contacted by asking for the "transit division" in most state governments.

See the Bibliography for technical materials which can be of assistance in designing a training program. A particularly good reference is Passenger Assistance Techniques: A Training Manual for Vehicle Operators of Systems Transporting the Elderly and Handicapped by William H. Henderson, et al., published by Transportation Management Associates, 2 Aruthur Drive, Fort Worth, Texas 76134. The University of Wisconsin offers audio-visual materials excellent for training drivers who transport handicapped students, adults, and elderly citizens.[1]

Maintaining the Enthusiasm of Volunteers

The "care and feeding volunteers" is a common expression to convey the extra work to maintain the commitment of the volunteers. Recognition is a part of this. Awards and publicity may or may not be an incentive. The direct sense of involvement and accomplishment is very crucial, and may be

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[1]Source for these materials is the Photographic Media Center, 45 North Charter Street, Madison, Wisconsin 53715.

fostered by the program management.

Some of the techniques used include:

* awards banquets
* pins
* letters of thanks
* newspaper stories
* newsletter stories in organizational channels
* getting the guests to arrange a special program

"Good works are their own reward" -- seems to work in some areas, not in others.

Finding Financial Support for Sustained Operations

The pure volunteer systems need little in the way of cash. Good will of the volunteers and a reputation for good service delivered will sustain the program for some time. Unfortunately, these pure volunteer systems tend to serve small areas, and small constituencies.

For the mixed systems, conventional financing sources can be found in the Bibliography. Briefly recounted these funding sources are as follows:

For Operating Assistance:

* State Operating Assistance

Transit support (where applied to paratransit)
To find out who is eligible, call the state's department of transportation (ask for a transit division).

* Human service agency budget support

To find out who has funds to write contracts for service, contact any of the following:

Area Agencies on Aging
Senior Citizens programs at the state level
Mental Health
Mental Retardation
Vocational Rehabilitation
Social Services, departments of at city or county level
Community Action Agencies
Employment and Training Programs
Medicare
Medicaid
Home Care Programs
Services and Commissions for the Blind

Private Sector Organizations

To find out other organizations who may be willing to spend money on mobility programs contact:

- Easter Seals
- United Way or United Fund
- Private Industry Councils
- Employer associations interested in van pooling
- Health Foundations (Cancer, Kidney, Epilepsy, and etc.)

Educational Organizations

- Community College
- Four year colleges and universities
- Technical Institutes
- Training and evaluation centers
- High school and continuing education programs
- Vocational and trade schools

Local Levels of Government

- County
- Township
- Municipality
- Regional (Council of Governments)
- Regional Transit Authority

Fund-raising activities of Volunteer Associations

- Bake sales
- Rummage sales
- Thrift shops
- Craft sales
- Other economic activities

Reaching Funds and Resources Efficiently

Funds are elusive. A lot of time can be wasted on writing fruitless proposals. One approach is to focus on third party payment arrangements of organizations which already have operating budgets approved and available.

Another approach is to develop a revenue stream early in the project. Ask users to make donations. In the Syracuse study, the average level of donations was $.60 per trip, but some systems suggested a donation of several dollars for longer trips.

Another approach is to ask for the donation of in kind services from public or private agencies. Here is a list of the typical donations and

services:

Item	Possible Sources
Space	County and local govt. agencies
Telephone	County and local govt. agencies
Garage space	Highway departments, local govt., gas station
Maintenance facilities	Technical Institute, Highway Dept.; county or state govt.
Secretarial support	County and local govt.; churches
Supplies and materials	Printers, colleges (for technical or training materials)
Training sessions for volunteer drivers	Hospitals, hospices, Red Cross

Agencies have had considerable success in obtaining needed in kind donations. The patterns vary widely, however, and must be determined by individual initiatives at the local level. Giving the donor something in return is useful: reduced rates for cancer treatment patients, in return for training sessions by a hospital, for example.

Developing Proposals for Funding

A good outline of a proposal for funding will include:

Abstract (one page summary of program, with one "bottom line" summary of requested funds)

Statement of Need (good summary of the target populations, and what evidence you have that they will use the proposed program)

Statement of Proposed Program to Meet the Need:

- staffing
- use of volunteers
- source of vehicles
- type of vehicles
- organization and management

Sources of Support

- Financial
- In kind services

Expected Results

- Ridership
- Effects of mobility program on agencies and programs
- Cost-effectiveness

Request for Funds

- Budget
- Justification
- Explanation of accountability and reporting requirements

Such proposals may be submitted to local governments, to human service agencies, to area agencies on aging in the annual budgeting process, or to other groups with a direct stake in the mobility of persons who are transportation dependent.

Success in Volunteer Transportation Program

Interestingly, the extent of funding is not a good predictor of success. Keys to a successful program appear to be the availability of a good manager, one who relates well to people (both volunteers and clients), who is dedicated to the success of the program and is willing to do the public relations work which the program demands, and who is willing to be flexible and let policies evolve over time. Tapping a large pool of volunteers is time-consuming: many groups must be contacted; screening, referrals, training, and supervision are costly in terms of time. Volunteers must feel rewarded, not necessarily monetarily, but rewarded with an assurance that their work is good, useful, and appreciated. Visible results of the program (better health or outlook of the users) are frequently the best "rewards," and they should be brought to the attention of those responsible. Successful programs have invested a lot of energy in marketing the program both to users and volunteers, and have good rapport with corollary groups (such as elected officials, chambers of commerce, human service agencies, and other volunteer associations such as FISH or Friendly Visitor).

All kinds of programs succeed: small, pure volunteer programs serving a handful of community members; human service agency programs which put one or two vans into the community; large programs with sophisticated scheduling of twenty or more vehicles. Each program can operate with economy and make a monumental contribution to the mobility and comfort of the relatively immobile population. The cases reported in the Syracuse study[1] attest to the variety of successful prototypes. Do not hesitate to create your own success model, one which fits your local community.

[1] See Volunteerism in Rural Public Transportation: A Report From Twenty Volunteer-Based Programs by T. Wallin, the companion study to this volume.

CHAPTER SEVEN

FIVE MOST FREQUENTLY ASKED QUESTIONS ON LOW COST VOLUNTEER SYSTEMS

In order to test the usefulness of information in this manual, the researchers at Syracuse University and Babson College made site visits to three rural areas which did not have any significant amount of rural passenger transportation. A three hour discussion of volunteer systems in each case drew forth numerous questions. This chapter takes the five most pressing issues which grew out of these discussions. Additional research brought some new answers to light.

QUESTION ONE. ARE VOLUNTEERS RELIABLE?

Answer: By the fact that so many volunteer-based systems are functioning, it is clear that under the appropriate circumstances, good, reliable transportation may come from volunteers.

The following is a list of agencies which depend in large measure on volunteer drivers to staff the program:

* BETHESDA HELP in Bethesda, Maryland
  All drivers are volunteer.

* CORP (County Older Resident Programs)
  of Clayton, Missouri
  All drivers are volunteer.

* MedVac of DeKalb, Ill
  All drivers are volunteer.

* Rock County RIDES of Janesville, Wisconsin
  All drivers are volunteer.

* Volunteer Center of Marin, California
  All drivers are volunteer.

* Volunteer Transportation-Escort Program
  of Seattle, Washington
  All drivers are volunteer.

These programs, like others who responded, were enthusiastic about the use of volunteers. None of the systems we spoke to felt that volunteers were unreliable to a point which threatened the program. All felt that turnover was light to moderate.

However, most of the site visit interviewees in the Syracuse study felt that it would be very difficult to find reliable volunteers in their area. One group felt that so many people were working it would be hard to develop a comprehensive roster of volunteers. A second group felt that the volunteers were potentially available, but the time to recruit and train them was too costly.

A third group seemed genuinely interested in the prospect for developing a volunteer program. The more rural areas, with fewer competing employment opportunities, appear to have the greater potential for developing programs. This group's concern was for the overall management and control. Would the group be able to screen the volunteers so that those persons insensitive to the needs of the vision impaired, the victims of stroke or cerebral palsy, or other disabled group, would not be included as volunteers?

The answer to this question seems very localized. Some areas are able to produce large numbers of volunteers; others cannot. The telephone survey of 300 towns found a number of small volunteer-based systems in every region of the country.

Do not underestimate your ability to find volunteers. Call the other volunteer transportation programs for direct inspiration on how to get the job done. Find national associations of volunteers through the Bibliography, and call for suggestions.

Finally, remember that the task may take a long time. Let the volunteers help you recruit others. Spread the word in a number of different networks (homemakers, elders, commuters, human service agencies, for example) and assess the results.

QUESTION TWO. CAN THE AGENCY AFFORD THE INSURANCE COSTS?

Most agencies interviewed paid in the vicinity of $400-$800 per year for a coverage which augmented the individual driver's own policy. The policies were written with local agents, who used a variety of insurers in many parts of the country. Most had no trouble getting such coverage, although the cost was of concern. The author is aware of one urban program of E/H transportation which received a cancellation of its insurance, and had to close down.

Insurance should cover not only property damage, but also liability coverage. The insurance policy should cover not only an initial set of volunteers, but also replacement volunteers as they come on board. Sometimes a program is already covered by a policy, if it is part of a county, or other government agency with a blanket policy. Check with the legal counsel of the governing unit to see whether this coverage is available.

The cost of insurance has risen steeply in the last few years, but is not prohibitive. A few systems felt they could get along without such coverage. These systems required that their drivers carry their own insurance.

In reality, most directors of programs felt that risks were minimal. The programs tend to operate only in daylight hours. Volunteers are typically newly retired persons, with

excellent driving records, who are thoroughly familiar with the roads in the area served. Low traffic densities further reduce the risk. Most programs took steps to screen potential volunteers: each volunteer had to show a valid license, had to show personal insurance coverage for his/her own vehicle if used in the program, and submit to a check with the state police records of past moving violations. Only safe drivers are accepted.

States have enacted "Good Samaritan laws" which protect the volunteer from legal action unless willful harm is perpetrated. Volunteers acting out of concern for the individual are not liable for inadvertant problems resulting from the volunteer acts. For more definition on this point, consult a local lawyer.

In one of the site visits, several groups expressed concern that the costs of insurance would prevent a program from ever getting started. One state DOT representative familiar with the Section 16(b)(2) program felt insurance would be impossible to buy very soon. Several insurance companies have withdrawn from writing policies for paratransit operations. New state legislation may be pending to deal with these matters, and contact should be made with the office of the Insurance Commission in each state.

Only one of the volunteer programs interviewed reported a law suit as a result of program operation. Most had heard of others which had had such suits. This fear of law suits was a compelling deterrent to some individuals. A program in Michigan received a law suit when someone fell, and was inexpertly handled by a driver volunteer not well trained in how to support a person. Although rare, the law suit is a potential threat to an organization and to the individual. Make volunteers aware of the risks, and any policies available to combat the risk. For example, some agencies limit volunteer activity to curbside delivery, and do not ask the drivers or aides to assist persons into the home. This policy cuts down on liability (for accident, theft, or other problem) but also may destroy the usefulness of the service, to the nonambulatory who must seek assistance for getting from curb to house. When no person is available to help, the nonambulatory may simply drop out of using the service.

Insurance rates are going up on a wide scale, but not just for paratransit programs. Risk management is key. Screen drivers, maintain vehicles, curtail operations when driving is hazardous.

If necessary, ask your Insurance Commission or the state Department of Transportation to investigate cases where low-risk service was denied coverage. The insurance "nightmare" wasn't a problem for the systems studied in the Syracuse project. Investigate whether there are local conditions in

your state which make it a problem. If not, you should easily get the needed coverage.

QUESTION THREE. WHERE CAN I GO FOR HELP?

Many energetic, bright, motivated community leaders have made a go of transportation programming. They have sought help in financing and marketing from the right channels. Who is available to help?

The answer is different for each state. But many states have at least a few of the following sources:

* technology sharing programs sponsored by the federal and state governments.

* higher education curriculum in transportation management (for a list of educators, contact the American Society of Transportation and Logistics, P.O. Box 33095, Louisville, Kentucky 40232).

* technical seminars conducted by transit authorities, by Rural America, by NASTA (National Association for Transportation Alternatives), by APTA (American Public Transit Association) or other groups interested in rural issues such as the National Association of Towns and Townships, Cooperative Extension, the Federal Highway Administration, the Urban Mass Transportation Administration or the state Departments of Transportation

A modest amount of help can be available from local planning departments. However, they are not trained specifically in paratransit management, and may feel reluctant to discuss operational issues. The authors can supply a list of paid consultants who will work with individual systems in their design and development.

QUESTION FOUR. DO I NEED A SPECIAL LICENSE TO START A VOLUNTEER TRANSPORTATION PROGRAM?

The answer varies from state to state. Some states still regulate those who provide common carrier service, including paratransit. The issue is cloudy for systems which are not open to the general public, or which do not charge an explicit fare.

In practice, the volunteer systems surveyed by Syracuse were not regulated or licensed as such. Of course, all had to register their owned vehicles. Assume you ar unregulated, if the state department of transportation does not tell you otherwise.

QUESTION FIVE. HOW DO I GET STARTED? WHAT WILL I NEED TO GET STARTED?

The principal ingredient is will. If you are determined to do it, there are usually no insurmountable problems. There will be many delays. You may finally turn out a system much different from what you first imagined.

Getting started usually involves polling the needs of agencies which serve the rural areas. What are the priority needs as they see them? Do they have examples of persons who were denied service because of inadequate transportation?

In making this poll, you will discover allies. Others may have thought about doing something like this, but just never got around to it. Start developing a list of these persons, particularly those with good ideas on which to build.

Call an initial organization meeting for 4 hours, to include lunch or dinner. Invite as many agencies as you can think of. Don't let any group feel left out, including advocacy groups for the transit dependent. Make sure the meeting room is accessible for wheel chairs! Provide a subsidized ride to the meeting! Hold several meetings (morning, noon, and night) so that groups that work at different times during the day may attend. Collect the ideas. Look around for resources already in use, but underutilized (such as vehicles which sit idle part of the day.)

Then start developing the idea which can grow into a proposal. Go through the plan, thinking of all the logical objections to the plan. Then develop a simple set of "questions and answers" to handle those objections. Distribute this document widely, and get more comments, suggestions, and donations.

Soon you will be able to identify the real resources which are likely to be available to you. Trim back your ideas if resources are not forthcoming. Don't promise more than you can deliver.

Prepare a budget, and discuss it with local decision-makers, including the local elected officials and their staffs. Amend the plan with the suggestions they make. If appropriate, send the amended plan to the State Department of Transportation, Transit Division for comment .

The plan will soon begin to take on a life of its own. Be prepared for more delays. Remember most of the successful systems took three or more years to develop, and they did so in an era of rising federal support.

If programs are temporarily shelved, revise them with less ambitious budgets. Start with a small, pure volunteer system, and see where it leads. Get yourself a lot of free publicity by issuing press releases to local reporters. Go on radio talk shows which broadcast to your area. Find a TV interviewer who needs to provide more time for local issues.

As you begin to see some elements of success, let your initial advisory group become aware of the outcomes. Bring them in to share the success, and help with later stages. Finally, make use of the comments coming from the riders. As customers, they will know what will attract more riders.

Draw in more resources from in kind contributions as the program grows. Let those who donated early in the program know that you remember their key role at the start. See if they can help you recruit other resources. Your reward will be the growth of an impressive mobility program, serving beyond the reaches of conventional transit to persons who will very much appreciate the service.

Appendix Profiles of Case Study Sited (by State)

Alabama

Voluntary Action Transportation System (VATS)
2125 East South Blvd.
Montgomery, Albama

Contact: Jean Bachelor, Admin. Assistant

Service Area: Montgomery County

Vehicles Registered: 20

Annual Budget: $3,310

Number of Volunteers: 15
Yearly Contribution: 3,870 hours

Drivers are all volunteers

System started in May 1977

Type of Service:
a. General Mobility for Select Clients
b. Emergency Mobility
c. Door to Door
d. Telephone Ordering
e. Demand Response - 24 hour notice

Sources of Cash:
a. United Way
b. Private Donor

Arizona

American Red Cross Special Transportation Service (STS)
4701 E. Washington St.
Phoenix, Ariz. 85034

Contact: Marjorie Gehrke

Service Area: Maricopa County (Phoenix)

Vehicles Registered: 61

Annual Budget: $408,830

Number of Volunteers: 302
Yearly Contribution: 117,480 hours

All drivers are volunteers

Type of Service:
- a. General Mobility for Selected Clients
- b. Door to Door
- c. Telephone Ordering
- d. Demand Response - 24 hour notice

Sources of Cash.
- a. Federal: $303,330
- b. State: $22,500
- c. Local: $47,500
- d. Social Service Agency: $18,750
- e. Fares and Contributions: $14,750
- f. Private Sources - $5,000 each:
  1. Lions Clubs
  2. Kiwanis Clubs
  3. Phoenix Soroptomist
  4. Four Hospitals
  5. Three Community Centers

California

Consolidated Transportation Service Agency
1700 Second Street
Suite 308
Napa, Cal. 94559

Contact: Martha Joyner

Service Area: Napa County

Vehicles Registered: 13

Annual Budget: $349,164

Number of Volunteers: 55
Yearly Contribution: 31,980 hours

Paid Drivers operate the agency's vehicles - 3 people

Volunteers drive their own vehicles

Start Time: February 1982

Type of Service:
- a. General Mobility for Selected Clients
- b. Door to Door
- c. Telephone Ordering
- d. Demand Response - 24 hour notice

Sources of Cash:
a. State: $235,793
b. Local: $236,668
c. Social Service Agency: $23,612
d. Fares: $14,730
e. Private Sources:
Community Agencies - $5,600

Volunteer Program
Volunteer Center of Marin, Inc.
Box 4160 Civic Center Branch
San Rafael, California 94913

Contact: Jean Forbes, Manager

Service Area: Marin County

Vehicles Registered: 0

Number of Volunteers: 2

All drivers are volunteers

Type of Service:
a. General Mobility for Selected Clients
b. General Mobility for the General Public
c. Door to Door
d. Telephone Ordering

Illinois

Faith Countryside Homes
1331 26th St.
Highland, Ill. 62249

Contact: Del Beckman

Service Area: Residents at Faith Homes

Vehicles Registered: 1

Annual Budget:
Unknown but negligible

Number of Volunteers: 10
Yearly Contribution: Approximately 580 hours

One paid worker does some of their driving - about 25%

Type of Service:
The bus is used for group trips and recreational activities for the residents at the home.

Sources of Cash:
Budget for the entire housing operation. HUD replacement fund provided money to put down on the vehicle - $30,240.

MedVAC
Voluntary Action Center
Suite 300
680 Haish Blvd.
DeKalb, Ill. 60115

Contact: Barb Burkart, Coordinator

Service Area: DeKalb County

Vehicles Registered: 3

Annual Budget:
Unavailable - MedVAC is part of a larger operation. The records are kept at a higher level of aggregation.

Number of Volunteers: 21
Yearly contribution: Approximately 2,360 hours

All drivers are volunteers

Type of Service:
a. General Mobility for Selected Clients
b. Demand Response - 24 hour notice

Sources of Cash:
Section 18
Title XX
Revenue Sharing
United Way
Contributions
Reimbursements

Iowa

Iowa Northland Regional Transit Commission
620 Mulberry Street
P.O. Box 2576
Waterloo, Iowa 50704

Contact: Donna Rhone, Transit Manager

Service Area: Several Countries in Northern Iowa

Vehicles Registered: 155

Annual Budget: $477,451

Number of Volunteers: 47
Yearly Contribution: Approximately 704 hours

Twenty-five (25) drivers are paid. They do approximately 98% of the driving.

Start Time: Summer of 1974

Type of Service:
a. General Mobility for Selected Clients
b. General Mobility for the General Public
c. Emergency Mobility for Select and General Public
d. Meals on Wheels
e. Door to Door
f. Telephone Ordering
g. Demand Response - 24 hour notice preferred, but not necessary

Sources of Cash:
a. Federal: $25,152
b. State: $48,373
c. Local: $32,948
d. Social Service Agency: $349,478
e. Fares and Contributions: $21,500
f. Private Sources:
1. Exceptional Persons, Inc. - $101,266
2. Hawkeye Valley Area Agency on Aging (HVAAA) - $43,000
3. Metropolitan Transit - $165,220
4. Headstart - $11,856

Maine

Eastern Transportation Services
153 Illinois Avenue
Bangor, ME 04401

Contact: Ann Hutchings/Donna Turner

Service Area: Piscataquis and Penobscot Counties

Vehicles Registered: 13

Annual Budget: $334,980

Number of Volunteers: 22
Yearly Contribution: 6,693 hours

All drivers are volunteers

Start Time: February 1, 1982

Type of Service:
- a. General Mobility for Selected Clients
- b. General Mobility for the General Public
- c. Door to Door
- d. Telephone Ordering
- e. Demand Response - 24 hour notice

Sources of Cash:
- a. Federal: $185,479
- b. State: $68,323
- c. Local: $17,490
- d. Fares: $15,822
- e. Private Sources:
  1. Municipalities - $14,750
  2. Sales of goods and services - $15,000

Washington - Hancock Community Agency, Transportation
P.O. Box 280
Milbridge, ME 04658

Contact: Nancy Harrington

Vehicles Registered: Agency - 5, Volunteer - 150 - approximately

Annual Budget: $222,125

Number of Volunteers: 65
Yearly Contribution: 9,804 hours

Type of Service:
- a. General Mobility for Selected Clients
- b. Emergency Mobility for Selected Clients
- c. Door to Door
- d. Telephone Ordering
- e. Demand Response - 24 hour notice

Sources of Cash:
- a. Federal: $138,772
- b. State: $37,830
- c. Local: $16,485
- d. Social Service Agency: $11,500
- e. Fares: $2,000
- f. Private Sources:
  1. American Kidney Fund - $9,540

Maryland

Bethesda Help
7115 Plantation Lane
Rockville, MD 20852

Contact: Betsy Smoley, Coordinator (answering service)

Service Area: Bethesda, Chevy Chase, Kensington area

Vehicles Registered: 0

Annual Budget: $5,000

Number of Volunteers: 120

All drivers are volunteers

Start Time: June 1970

Type of Service:
- a. Emergency Mobility for Select Clients
- b. Door to Door
- c. Telephone Ordering
- d. Demand Response - 24 hour notice - preferred

Sources of Cash:
- a. Local: $75.00
- b. Donations from members: $4,925 approximately

Massachusetts

Bolton Council on Aging
P.O. Box 342
Bolton, MA 01740

Contact: James Delaney

Vehicles Registered: 0

Annual Budget: 0

Annual Budget: 0 - all volunteer

Number of Volunteers: 4

All drivers are volunteers

Start Time: Summer of 1983

Type of Service:
- a. General Mobility for Selected Clients
- b. Door to Door
- c. Telephone Ordering

Sources of Cash:
- a. Volunteers cover all expenses

Missouri

Country Older Resident Program (corp.)
555 Brentwood Blvd.
Clayton, MD 63105

Contact: Ilene Shaw

Service Area: St. Louis County

Vehicles Registered: 266

Annual Budget: $38,000

Number of Volunteers: 237
Yearly Contribution: 40,580 hours

All drivers are volunteers

Type of Service:
a. General Mobility for the General Public
b. Door to Door
c. Telephone Ordering
d. Demand Response - 24 hour notice

Sources of Cash:
a. Fares: $10,288

OATS, INC.
100 E. Texas Street
Columbia, MD 65201

Contact: Marla Mueller, Marketing Manager

Service Area: 88 Counties in Missouri

Vehicles Registered: 160

Annual Budget: 3 million

Number of Volunteers: 933
Yearly Contribution: 85,193 hours

All drivers are paid

Start Time: November 1971

Type of Service:
a. General Mobility for Selected Clients
b. General Mobility for the General Public
c. Door to Door
d. Telephone Ordering
e. Demand Response - 24 hour notice

Sources of Cash:
- a. Federal: $2,591,727
- b. State: $242,926
- c. Local: $329,951
- d. Social Service Agency: $88,179
- e. Fares and Contributions: $242,655
- f. Private Sources:
  1. Bus Match Total - $126,950

New Hampshire

Strafford County (CAP)
Rochester Outreach Office
36 Autumn Street
Rochester, N.H. 03867

Contact: Nancy Morneault

Service Area: Strafford County

Vehicles Registered: 2

Annual Budget: $45,000

Number of Volunteers: 14
Yearly Contribution: $10,512 hours

Drivers are volunteers - 75%

Start Time: January 1975

Type of Service:
- a. General Mobility for Selected Clients
- b. Door to Door
- c. Telephone Ordering

Sources of Cash:
- a. Federal - State: $34,000
- b. Local: $2,000
- c. Fares: $3,000
- d. County: $3,000

New York

Gadabout
710 W. Court St.
Ithaca, NY 14850

Contact: Judy Willis, Executive Director

Service Area: Tompkins County

Vehicles Registered: 8

Annual Budget: $101,369.49

Number of Volunteers: 14
Yearly Contribution: 5,184 hours

Drivers are volunteers - 75%

Type of Service:
a. General Mobility for Selected Clients
b. Emergency Mobility for Selected Clients
c. Door to Door
d. Telephone Ordering
e. Demand Response - 24 hour notice

Sources of Cash:
a. Revenue Sharing: $39,100
b. Fundraiser: $2,600 (1984)
c. Private Sources:
1. Rent from extra space - $600
2. Donations - $1,472 (1984)

SCAT
Transportation Project for Cayuga County, Inc.
P.O. Box 131
Auburn, NY 13021

Contact: Susan Sloan

Service Area: Cayuga County

Vehicles Registered: 8

Annual Budget: $90,689

Number of Volunteers: 76
Yearly Contribution: 31,800 hours

All drivers are volunteers

Start Time: January 1977

Type of Service:
a. General Mobility Selected Clients
b. Emergency Mobility for Selected Clients
c. Door to Door
d. Telephone Ordering
e. Demand Response - 24 hour notice

Sources of Cash:
- a. Federal: $12,500
- b. State: $27,100
- c. Local: $44,800
- d. Fares and Contributions: $21,300
- e. Private Sources:
  1. United Way - $14,200
  2. Centro, Inc. - $5,000
  3. Local Organizations - $3,000

Madison County Senior Citizens Transportation
P.O. Box 250
Morrisville, NY 13408

Contact: Catherine Rodda

Service Area: Madison County

Vehicles Registered: 0

Annual Budget: $11,556

Number of Volunteers: 32
Yearly Contribution: $3,384

All drivers are volunteers

Start Time: April 1982

Type of Service:
- a. General Mobility for Selected Clients
- b. Door to Door
- c. Telephone Ordering

Sources of Cash:
- a. Federal: $9,234
- b. Local: $2,327
- c. Private Sources:
  1. Fund Drive - $900

Sen - Cen
Seneca County Office for the Aging
P.O. Box 480
Seneca Falls, NY 13148

Contact: Amy Walters

Service Area: Seneca County

Vehicles Registered: 4

Annual Budget: $18,300

Number of Volunteers: 18
Yearly Contribution: 3,276 hours

Drivers are volunteers - 75%

Start Time: February 1981

Type of Service:
a. General Mobility for Selected Clients
b. Emergency Mobility for Selected Clients
c. Door to Door
d. Demand Response - 24 hour notice

Sources of Cash:
a. Federal: $21,000
b. State: $8,000
c. Local: $4,000
d. User charge: $4,000

Washington Transportation - Escort Program
1601 Second Ave. Suite 800
Seattle, WA 98101

Contact: Joseph Sonntag

Vehicles Registered: 0

Annual Budget: $77,542

Number of Volunteers: 54
Yearly Contributions: 9,024 hours

All drivers are volunteers

Start Time: May 1982

Type of Service:
a. General Mobility for Selected Clients
b. Emergency Mobility for Selected Clients
c. Door to Door
d. Demand Response - 24 hour notice

Sources of Cash:
a. Federal: $20,826
b. State: $56,496
c. Social Service Agency: $218
d. Donations: $2,009

Wisconsin

Rock County RIDES
51 S. Main Street
Janesville, Wisconsin 53545

Contact: David Lowe

Service Area: Rock County

Vehicles Registered: 0

Annual Budget: $190,551

Number of Volunteers: 68
Yearly Contribution: 18,636 hours

Virtually all of the drivers are volunteer.

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The manual is a guide to volunteers who want to meet the transportation needs of older Americans. It contains useful checklists on how to set up programs, operate vehicles, avoid pitfalls, and get started. It gives interesting exhibits of forms, comments on insurance, and other "nuts and bolts" suggestions.

2) ALLARD, M.A., Rural Transportation for Human Services: A Guide for Local Agencies, Human Services Research Institute, Washington, D.C. 20006.

3) AMERICAN ASSOCIATION OF STATE HIGHWAY AND TRANSPORTATION OFFICIALS, Rural and Specialized Transportation: UMTA Programs and the States, August 1984. Report available from AASHTO, 444 North Capitol Street, N.W., Suite 225, Washington, D.C. 20001 at cost.

4) BERKHARDT, Jon E., Sue F. KNAPP, and Mark J. RAMSDELL, Coordinated Transportation Demonstration Results. Evaluation of the Office of Human Development Services Transportation Demonstration Program. February 29, 1980. Available from the National Technical Information Service, Springfield, Virginia 22161: Order No. PB 85-174852, Price Code A09/A01.

A helpful review of the results of the coordination demonstration experiments. The financial data must be viewed in a special light: federal funds in the form of demonstration grants permitted expansion of service to higher levels than would normally be possible for rural systems. Only one or two of the demonstrations occurred in rural areas.

5) BYRNE, B.F. AND E.S. NEUMANN, Feasibility of Developing Low-Cost Measures of Demand for Public Transportation in Rural Areas. Prepared by West Virginia University, Morgantown, West Virginia 26506.

6) COLLURA, John, et. al., Apportioning the Costs of Rural Public Transportation Among Participating Towns and Human Service Agencies. U.S. Department of Transportation. Prepared by the Department of Civil Engineering, University of Massachusetts, Amherst, Massachusetts 01003. June 29, 1982.

This report offers some relatively straight-forward formulas to sharing the costs of rural transportation among various users, including human service agencies. The report neglects some economic issues, such as economics of scale, but focuses on local techniques, including a limited selection of case studies.

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This document summarizes a very interesting state-originated experiment. The state offers interest-free financing, and mass-purchase of vehicles, to the Rideshare Company which markets, promotes, administers, and monitors the deployment of vans for van pooling. The report discusses finances, regulations, and implementation difficulties.

8) DAVIS, Frank W., Jr. and Stephen LE MAY, Implementing Driver Selection and Training for Human Service Agencies: Administrator's Guidelines. Final Report, May 1980. Report is available from the National Technical Information Service, Springfield, VA. 22161. Order No. PB 84-222926, Price Code A04/A01.

9) FEISS, Caroline L., Vehicle Maintenance: A Study of Vehicle Maintenance Practices among Section 16(b) (2) Grantees. August 1981. Report prepared by the Public Transportation and Planning Division, Washington State Department of Transportation, Highway Administration Building, Olympia, Washington 98504. Report is available from the National Technical Information Service, Springfield, Virginia 22161.

This report does not itemize the preventive maintenance requirements of designated vehicles. Rather, it describes agency approaches in a general way. It does have some helpful examples of sample maintenance program forms used by grantees.

10) FLEISHMAN, Daniel. The Point-to-Point Club: An Elderly and Handicapped Service based in Ardmore, Pennsylvania. March 1983. Report prepared by Multisystems, 1050 Massachusetts Avenue, Cambridge, MA. 02138, for the U.S. Department of Transportation, Urban Mass Transportation Administration. The document is available from the National Technical Information Service, Springfield, Virginia 22161. Order No. PB 83-209171, Price Code A03/A01.

This report gives institutional details about a cooperative providing transportation services to Club members who pay $10 annually in addition to charges for individual trips.

11) GARRITY, Richard. "Safety and Design Considerations in Wheelchair Life/Van Specifications" in U.S. Department of Transportation. The Sixth National Conference on Rural Public Transportation, Final Report. November 1983. Report is available from the National Technical Information Service, Springfield, VA. 22161. Order No. PB 85-114668, Price Code A13/A01.

12) HENDERSON, William H., Raymond L. DABNEY, and David D. THOMAS, Passenger Assistance Techniques: A Training Manual for Vehicle Operators of Systems Transporting the Elderly and Handicapped. Transportation Management Associates, 2 Arthur Drive, Fort Worth, Texas 76134.

13) HOOD, Thomas C. and Linda S. GEISS, The Volunteer Transportation Program: Some Suggestions and Cautions in the Use of Volunteers as Drivers, Escorts, and Other Transportation Workers. Prepared for the Bureau of Mass Transit, Tennessee Department of Transportation by the Transportation Center of the University of Tennessee. Revised, April 1982. Report is available from the U.S. Department of Transportation's Technology Sharing Program (I-30), Room 9402 Nassif Building, 400 Seventh Street SW, Washington, D.C. 20590 while supplies last.

This is a very useful manual which covers the topics of "Why a Volunteer Transportation Program?", "Characteristics and Problems of a Volunteer Transportation Program", "How to Organize a Volunteer Transportation Program" and "Resources." An Appendix gives a sample volunteer guide with some important "nuts and bolts."

14) INDIANA DEPARTMENT OF TRANSPORTATION, DIVISION OF PUBLIC TRANSPORTATION, Specification Guide for Small Transit Vehicles. February 1984. Available from the National Technical Information Service, Springfield, VA. 22161. Order No. PB 85-204436, Price Code A04/A01.

A very thorough discussion of vehicle layout, size, and other bases for choice in small transit vehicles. Highly recommended.

15) KIDDER, Alice E. "Cost of Alternatives Systems to Serve Elderly and Handicapped in Small Urban Areas," Proceedings of the Transportation Research Forum, 1976, 131-135.

16) ------. "Economic Costs and Benefits of Rural Consolidated Social Service-Based Transportation." Paper presented at the Annual Meeting of the Gerontological Society of America, San Francisco, November 18, 1983. Available from the author, c/o Babson College, Babson Park, MA 02157.

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20) -----. Sources of Non-Federal Support for Public Transportation in Nonurbanized Areas, National Technical Information Service, Springfield, VA. 22161. Order No. PB 284-410. 1978.

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22) MC KELVEY, Douglas J., Evaluating Rural Public Transportation, February 1977. Prepared by the Transportation Institute, North Carolina A & T State University, Greensboro, N.C. 27411 for the Program of University Research, Office of the Secretary of Transportation, Washington, D.C. 20590. The document is available from the National Technical Information Service, Springfield, VA. 22161, Order No. PB-269287 at cost.

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24) MINNESOTA DEPARTMENT OF TRANSPORTATION, Performance Evaluation Process. No date.

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This is a 57 page example of a statewide inventory of vehicles and programs.

26) NEWELL, Betty L. and Peter SCHAUER, "A Virginia Model for Financial and Community Support of Rural and Specialized Transportation Systems," in Financing State and Local Transportation, Transportation Research Record Number 1009. 1985. Available from the Transportation Research Board, National Research Council, 2101 Constitution Avenue N.W., Washington, D.C. 20418 at cost.

27) NORTH CAROLINA DEPARTMENT OF TRANSPORTATION, PUBLIC TRANSPORTATION DIVISION, Transportation Development Planning for Nonurbanized Areas, January 1979 (currently out of stock).

28) PENNSYLVANIA DEPARTMENT OF TRANSPORTATION, BUREAU OF PUBLIC TRANSIT AND GOODS MOVEMENT SYSTEMS, Rural Management Assistance Project: Para-transit Case Studies. January 1981. Report is available from the National Technical Information Service, Springfield, Virginia 22161. Order No. PB 84-211390, Price Code A09/A01.

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29) PENNSYLVANIA DEPARTMENT OF TRANSPORTATION, BUREAU OF PUBLIC TRANSIT AND GOODS MOVEMENT SYSTEMS, Rural Public Transportation Performance Evaluation Guide. November 1982. Report prepared by Carter-Goble Associates, P. O. Box 11287, Columbia, S.C. 29211. Report is available from the U.S. Department of Transportation's Technology Sharing Program (I-30), Room 9402, Nassif Building, 400 Seventh Street S.W., Washington, D.C. 20590 while supplies last.

This is a useful report listing alternative indicators of revenue, subsidy, service quality, service level, and safety. It was not written with volunteer systems in mind, however, and presupposes a high level of technical personnel to perform the evaluations. It presupposes a great deal of bookkeeping information available.

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This periodical is available from Rural America, Cooperative Transportation Project, 1312 18th Street N.W., Washington, D.C. 20036. Useful for current issues. It lists state coordinators and other helpful lists of "who's who in rural transportation" as well as good articles on current programs, public policy issues and techniques. Subscriptions are $33.75 per year.

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A technical discussion using advanced mathematics. Interesting for professional planners.

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39) TEAL, Roger F. et. al., Shared Ride Taxi Services as Community Public Transit. March 1980. Prepared by the Institute of Transportation Studies, School of Social Sciences, University of California, Irvine, California 92717, for the U.S. Department of Transportation Urban Mass Transportation Administration. Report is available from the National Technical Information Service, Springfield, VA. 22161. Order No. PB 80-226475, Price Code A11/A01.

This is a helpful review of SRT practice in California. The uniqueness of funding, labor conditions, and population density may limit its power to offer guidance to rural areas in other parts of the country. The report is very well written and offers important detail on the functioning of SRT.

40) -----. Taxi-Based Special Transit Services, Final Report, March 1983. Report is available from the National Technical Information Service, Springfield, VA. 22161. Order No. 84-101625, Price Code A07/A01.

41) TICE, Robert K. and Robert P. FAIN, "Volunteers in a Rural Specialized Transportation Program: the OATS' Experience," Specialized Transportation Planning and Practice, 1983, Vol. 1, 225-235. Discusses the techniques for financing and recruiting volunteers into the very successful OATS program. A useful case study.

42) TRANSPORTATION ACCOUNTING CONSORTIUM, A Model Standard Chart of Accounts for Rural and Specialized Transportation Providers. This report is available from Ken Malkowski, Transportation Accounting Consortium, P. O. Box 30037, 300 Capitol Avenue, Lansing, MI. 48909.

This manual presents a transportation model chart of accounts, and defines revenues and expense items for day-to-day use. It also discusses assets, liabilities, and capital accounts. It is very useful for interagency accounting, where complicated transactions are necessary.

43) TRANSPORTATION ACCOUNTING CONSORTIUM, Simplifying Human Service Transportation and Small Transit System Accounting: A Six State Perspective. This report is available from Ken Malkowski, Transportation Accounting Consortium, P. O. Box 30037, 300 Capitol Avenue, Lansing, MI 48909.

This report describes the issues involved in interagency financial transactions in six states. It discusses state implementation of human service transportation billing, and state mechanisms for improving the cash flow to transportation providers. It is very useful for interagency accounting, where complicated transactions are necessary.

44) U. S. DEPARTMENT OF HEALTH AND HUMAN SERVICES, Office of Human Development Services. Project Respond, Fayetteville, Arkansas, Two Year Demonstration Report, March 1980. USDHHS, OHDS, Washington, D.C. 20201. Report prepared by Community Resource Group, Inc Fayetteville, Arkansas.

Entries 44-46 are part of a series of reports on experiments in coordinated transportation funded by the Office of Human Development Services. After a few months of operation, the consolidated transportation system described in this report was already providing ten percent increased service levels, with a nine percent drop in cost outlays, despite inflation and rising fuel costs. Reference 4 is the summary report for this series.

45) U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES, Office of Human Development Services. RIDE Jacksonville, Florida, Two Year Demonstration Report, March 1980. USDHHS, OHDS, Washington, D. C. 20201. Report prepared by Northeast Florida Community Action Agency, Inc. Jacksonville, FA.

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47) U.S. DEPARTMENT OF TRANSPORTATION, Bus Route Costing Procedures: A Review. May 1981. Prepared by Simpson & Curtin Division, Booz, Allen & Hamilton, Inc. Philadelphia, PA. Report is available from the U.S. Department of Transportation's Technolog Sharing Program (I-30), Room 9402 Nassif Building, 400 Seventh Street S.W., Washington, D. C. 20590 while supplies last.

48) USDOT. Federal Highway Administration. Public Transportation for Rural and Small Urban Areas: A Report on Coordination in 12 Selected Section 18 Projects. November 1982. Report is available from the National Technical Information Service, Springfield, VA. 22161. Order No. PB 83-180596 at cost.

Gives helpful case examples of rural systems which have received Section 18 funds. In many states, however, the Section 18 funds are not available to new starts because they have been previously committed, because the state regulations prevent their use for client-oriented transportation. Generalizations to volunteer systems, therefore, must proceed with caution.

49) USDOT. Office of the Secretary of Transportation. Transit Works: 10 Rural Case Studies. June 1982. Report prepared by The Institute for Urban Transportation, School of Business, Indiana University, Bloomington, Indiana. Report is available from the National Technical Information Service, Springfield, VA. 22161. Order No. PB 85-102531, Price Code A05/A01.

The report gives good case material on ten systems with considerable amounts of federal funding. With the exception of OATS, most did not use significant numbers of volunteers. The data are useful for comparative purposes.

50) USDOT. Urban Mass Transportation Administration. Paratransit in Rural Areas. Report prepared by Multisystems, 1050 Massachusetts Avenue, Cambridge, MA. 02138. Report is available from the National Technical Information Service, Springfield, Va. 22161. Order No. PB 83-163618, Price Code A04/A01.

51) USDOT. Urban Mass Transportation Administration. Paratransit Services for the Transportation Handicapped. Report prepared by Multisystems, 1050 Massachusetts Avenue, Cambridge, MA. 02138. Report is available from the National Technical Information Service, Springfield, VA. 22161. Order No. PB 83-169649. Price Code AC6/A01.

This report contains some useful case studies, and statistical data on a large number of paratransit systems designed to provide service to the handicapped. Operators may be interested to compare their own operating data to that of these systems.

52) USDOT. Urban Mass Transportation Administration. Saving on Bus Insurance in Wisconsin: Joint Vehicle Insurance Program Implementation. Prepared by Warren, McVeigh & Griffin, Inc. 1420 Bristol Street North, Suite 220, Newport Beach, California 92660. Report is available from the National Technical Information Service, Springfield, VA. 22161. Order No. PB 84-213768, Price Code A05/A01.

The report describes the Wisconsin Municipal Transit Insurance Commission, which provides vehicle insurance programs for 14 Wisconsin municipal transit systems, thereby saving about $275,000, or 47% over the cost of their expiring programs. Applications to rural, volunteer based systems must be inferred.

53) USDOT. Urban Mass Transportation Administration. Transit Service and Organizational Alternatives for a Low Density Suburban-Rural Area: A Study of Public Transit Options for Albemarle, County, Virginia. Prepared by the Department of Civil Engineering, University of Virginia for the University Research and Training Program, Urban Mass Transportation Administration. Report is available from the National Technical Information Service, Springfield, VA. 22161. Order No. PB 299-475 at cost.

This report reviews organizational arrangements for public and private approaches to rural transportation. It is somewhat outdated, given changes in funded programs. The reader may be interested in the alternative organization charts presented.

54) USDOT. Urban Mass Transportation Administration. Use of Volunteers in the Transportation of Elderly and Handicapped Persons. Prepared by Del Green Associates for the Office of Technical Assistance, UMTA. January 1984. Report is available from the U.S. Department of Transportation's Technology Sharing Program (I-30), Room 9402 Nassif Building, 400 Seventh Street S.W., Washington, D.C. 20590 while supplies last.

This report describes characteristics of current volunteer programs for specialized clientele, the elderly and handicapped. It describes the characteristics of the riders, and the programs. It offers recommendations on ways which the private sector can be of greater assistance to volunteer transportation programs. It reviews the following volunteer programs: City of Huntsville; Voluntary Action Center of Montgomery, Alabama; American Red Cross, Phoenix, Arizona; Volunteer

Bureau of Marin County, California, and many more. It offers a good selection of forms, advertising examples, and other "nuts and bolts" information.

55) U.S. DEPARTMENT OF TRANSPORTATION AND U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES. The Transportation Accounting Consortium: A Six-State Analysis of Accounting and Reporting Practices for Human Services Transportation. Vol. 1. Final Report, March 1982. Report prepared by Carter-Goble Associates, Inc. with Applied Resource Integration, Ltd. Report is available from the U.S. Department of Transportation's Technology Sharing Program (I-30) Room 9402 Nassif Building, 400 Seventh Street S.W., Washington, D.C. 20590 while supplies last.

This is an extremely useful guide to transportation accounting, but applicable only where the complexities of interagency funding dictate a professional approach. Simple, volunteer-based programs may escape the need to account for and report complicated cash reimbursement, by virtue of having donated resources.

56) WALTHER, Erskine S. State and Local Financing of Public Transit. Prepared by the Transportation Institute, North Carolina Agricultural and Technical State University, Greensboro, N.C. 27411 for the University Research and Training Program, Urban Mass Transportation Administration, U.S. Department of Transportation. Report is available from the National Technical Information Service, Springfield, VA. 22161. Order No. PB 83-261065, Price Code A10/A01.

A thorough review of non-federal funding, but primarily discussing large urban systems.

57) WILLIAMS, Margaret and Stockton CLARK, "Something Funny Happened on the Way to Coordination....," a paper prepared for the First AOA & UMTA National Conference on Transportation for the Elderly and Handicapped, Orlando, Florida, October 24-27, 1984.

The paper describes the growing pains of one New York county's experience in trying to establish a coordinated system of transportation using UMTA 16(b) (2) vehicles, Section 18 funds, and local agency resources. The lessons may not be generalizable.

58) YOUNG, Terry A. "Driver Selection in the Rural Transit Industry: A Risk Management Perspective," in U.S. Department of Transportation, The Sixth National Conference on Rural Public Transportation, Final Report, November 1983. Report is available from the National Technical Information Service, Springfield, VA. 22161. Order No. PB 85-114668, Price Code A13/A01.

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